

# **MONTANA STATE LIBRARY**

## **LSTA EVALUATION**

**2002 - 2006**

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MONTANA STATE LIBRARY  
LSTA EVALUATION  
SECTION I

**EXECUTIVE SUMMARY**

The Montana State Library uses LSTA funds to support statewide activities that promote quality library services. These efforts are guided by the following LSTA goals.

- ✓ Montana public librarians and trustees have easy access to the training they need to provide quality library services to their communities.
- ✓ To improve library services to citizens by establishing an adequate and stable taxing district.
- ✓ Montana citizens will understand, value, and use the services of Montana's libraries.
- ✓ Montana citizens have easy and complete access to the information they need at their libraries.
- ✓ Citizens and students have easy access to and use multiple electronic information resources through their libraries.
- ✓ Montana citizens can easily access the holdings of all Montana and OCLC libraries and online electronic resources through their libraries.
- ✓ Montana citizens and students will have dependable access to electronic information services at their libraries by the end of 2007.
- ✓ To ensure that all eligible clients know about the availability of services from the Montana Talking Book Library (MTBL) and to make enrollment and use of the service easy for users.
- ✓ MTBL will plan and implement a smooth transition to a digital format to ensure that the potential for expanded services are available to MTBL patrons.
- ✓ Allow service to patrons to be provided more efficiently and effectively by providing enough space for the MTBL collection.
- ✓ Increase productivity and satisfaction of MTBL staff members and volunteers.

The strategies used to carry out these goals are organized into five program areas. These include continuing education/consulting, library taxing districts, promoting library services, access to information, and the Montana Talking Book Library. This evaluation indicated progress in all LSTA goal areas as described in Section II of this report.

The continuing education program was chosen for the in-depth evaluation. A review of program descriptions, evaluation forms, and statistics was combined with feedback from the Montana library community via an online questionnaire. Two-thirds of the respondents had attended at least one MSL training event in the last three years. Significant outcomes were identified in terms of amount learned and application of new skills and knowledge in local libraries. Specifically, library staff reported improved service for customers, enhanced technology, increased access to online information, increased use of ILL, effective use of the Montana Shared Catalog, quality cataloging, networking among librarians, more confident library staff, and increased effectiveness of library trustees.

The Talking Book Library evaluation indicated clear outcomes for users of that service. The public library community is a key referral agency for those with vision problems and has a good understanding of the MTBL services. MTBL users are likely to tell several people about the service, indicating a high level of satisfaction with the program. The service is a primary source of enjoyment for users, and those who responded to a telephone interview described the service as a "lifesaver;" it allows people to remain avid readers. The services also provide a way to keep up with current events and to gather needed information. Impact stories from the interviews and letters from patrons illustrate what a difference MTBL makes in the lives of users.

The MSL uses LSTA funds for statewide projects in order to provide the greatest return on the investment. This approach allows LSTA to do the most good for the most libraries. The library community supports this approach, recognizing the contribution made by LSTA in the state.

This LSTA evaluation used multiple strategies. These include key informant interviews, analysis of existing information, online questionnaires, and telephone interviews.

**MONTANA STATE LIBRARY  
LSTA EVALUATION  
SECTION II**

This section of the LSTA evaluation reviews the Montana LSTA goals and reports outcomes related to these goals. The key outcome statements are taken from the MSL long-range plan. Expenditures and grants are summarized in each program area. Note that the figures reported for 2006 are budgeted amounts, not actual expenditures.

**PROGRAM AREA:** Continuing education/consulting

Montana State Library has an aggressive continuing education and consulting program for librarians and trustees. Three major training events are held each year: 1) the fall workshop, a two-day event for librarians from all types of libraries featuring a variety of training topics, many requested by librarians; 2) the summer institute, a three to five-day event for public library directors and trustees on leadership issues; and 3) the trustee workshops, a one-day training offered in two locations on topics of special interest to trustees. The Library Board Education Program features trained volunteer public library trustees traveling to communities to provide basic board training on request. State library staff provide numerous additional training opportunities on specialized topics, such as features of the Montana Shared Catalog or using statewide electronic resources. To enhance the continuing education program, a new training specialist position has been created to provide customized and locally available training as well as instruction using online and live meeting technologies.

Each year, the Library Development Division consultants respond to thousands of requests for information and travel thousands of miles to visit libraries across the state to provide assistance as needed. Several publications have been written and distributed to assist library leaders to be more effective including handbooks for trustees and for new library directors.

TOTAL FOR PROGRAM AREA:                           **\$973,835**

Fall Workshop (2002)                                   **\$15,068**

Fall Workshop (2003)	\$7,580
Fall Workshop (2005)	\$10,910
Fall Workshop (2006)	\$13,000
Library Trustee Training (2002)	\$15,000
Library Trustee Training (2003)	\$9,999
Library Trustee Training (2005)	\$10,902
Library Trustee Training (2006)	\$22,000
Summer Institute (2004)	\$20,000
Summer Institute (2005)	\$10,083
Summer Institute (2006)	\$20,000
Training Specialist (2005)	\$25,758
Training Specialist (2006)	\$54,000
Library Development Department (2002)	\$149,231
Library Development Department (2003)	\$149,231
Library Development Department (2004)	\$138,595
Library Development Division (2005)	\$149,234
Library Development Division (2006)	\$149,234
Children's Services Consultant (2005)	\$1,000
Children's Services Consultant (2006)	\$3,000

**Goal:** Montana public librarians and trustees have easy access to the training they need to provide quality library services to their communities.

**Key outcome:** Citizens will report higher quality of library services.

Four indicators show progress on this goal.

- 1.) At least three additional Montana libraries employed a director who holds a MLS.
- 2.) Approximately 90 percent of Montana public libraries employ a director with an MLS, associate degree in library technology, or has enrolled in the summer institute program.
- 3.) Librarians, trustees, and public officials requested information from MSL consultants 24,000 times during the last two years.
- 4.) Librarians indicated that consulting services contributed to their success on a 2007 online questionnaire. Four out of five librarians rated consulting services as *useful*. Within this group, 40 percent rated the consulting as *very useful* and 18 percent rated it as

*essential* (n=300). Public librarians were the most likely to rate the consulting *very useful* or *essential* (57%, n=140). A similar pattern emerged when asked about the importance of consulting services. Four out of five rated the consulting as *important*, with 35 percent rating it as *very important* and 27 percent rating it as *essential* (n=313).

On the 2007 online survey of librarians, respondents were asked to indicate progress on key outcomes for LSTA. For the outcome "Montana citizens will report a higher quality of library services," 47 percent felt *good progress* had been made in this area, and 40 percent reported *significant progress* (n=332). For the outcome "Montana citizens will highly value library services," half indicated *good progress* and 37 percent reported *significant progress*.

For library staff and trustee training, respondents were asked about two outcomes. For the outcome, "training provided to Montana library staff and trustees is easily accessible," 46 percent felt *good progress* has been made and 28 percent reported *significant progress*. One out of five people, however, reported *limited* or *no progress* in this area. This reflects a continued concern about effectively delivering training in the more remote areas of Montana. For the outcome, "training provided to Montana library staff and trustees improved library service," nine out of ten indicated *progress*. Nearly half (45%) indicated *good progress*, with 37 percent reporting *significant progress*, and eight percent reporting that the outcome has been *fully achieved*.

[See Section III for an in-depth evaluation of the state library's continuing education program.]

## **PROGRAM AREA: Library taxing districts**

Montana State Library continues to provide information to library leaders on the possible advantages of reorganizing into library districts. Legislation is in place that makes it possible for public libraries to form districts that go beyond city or county boundaries to increase the existing tax base. In order for Montana library leaders to learn first hand about the advantages of reorganization, bus trips to two neighboring states were offered. The group

visited and studied countywide library systems in Wyoming and library districts in Idaho. The state library also produced and distributed a manual on forming public library districts.

The majority of LSTA funds used for this program area are incorporated in the Library Development Division funds, listed in the previous program area. In addition, \$18,012 was used for the Wyoming/Idaho Bus Trips.

**Goal:** To improve library services to citizens by establishing an adequate and stable taxing district.

**Key outcome:** Three areas of Montana will be served by a library district, with community members reporting improved services.

One district was established by December 2006 and two additional districts are in the process of being formed. The district that was created in 2006 was supported by a large levy passed by the citizens. The referendum provided \$99,500 to support the district. It passed with 59 percent of the vote (51% required). Given the recency of the new district, there is no evidence available yet to measure improved services.

### **Wyoming and Idaho Bus Trip**

This project was designed for library directors and trustees to learn first hand about possible solutions to chronic library financial problems through consolidation and reorganization. This fact-finding travel was designed to demonstrate the advantages and disadvantages of countywide library systems and library districts. Seven Wyoming libraries and six Idaho libraries were visited during these trips. A total of 33 people participated in the trips, spending a total of 553 hours to tour libraries and meet library staff and trustees. In addition, discussions and presentations occurred while traveling on the bus.

One trustee from an area where a district had been proposed traveled to both Wyoming and Idaho to learn more about this type of system. After the trips, she reported, "It was invaluable to me, a non-librarian, to get to share with librarians and ask questions of people already involved in district libraries." Another participant wrote, "It was an educational time for me. It

put in place just how close we in the Hi-line shared catalog are to the systems in Wyoming and how we could gain from their way of funding." One trustee concluded, "Networking among ourselves and meeting trustees and directors all made it rewarding for me."

### **PROGRAM AREA:** Promoting library services

Montana State Library continues to help libraries promote the services and information they provide. The What's Your Story? program provides a Web site for all librarians to access that includes programming ideas and materials. Each year the project, with input from librarians across the state, targets a different group of potential library users, such as seniors or baby boomers or infants. Then, programming ideas, materials, and promotional tips are developed and posted on the Web site for all librarians to use. State library staff also provide regular training for librarians on using the What's Your Story? materials and on customizing the programming ideas for local audiences.

TOTAL FOR PROGRAM AREA:	\$112,026
Public Information Officer (2002)	\$28,225
What's Your Story? Programming (2003)	\$28,225
What's Your Story? Programming (2004)	\$10,837
What's Your Story? Programming (2005)	\$19,739
What's Your Story? Programming (2006)	\$25,000

**Goal:** Montana citizens will understand, value, and use the services of Montana's libraries.

**Key outcomes:** Public librarians will develop a marketing plan and citizens will highly value public library services.

Four indicators show progress on this goal.

- 1.) Eighty-five percent of Montana public library directors attended a workshop on marketing.
- 2.) MSL developed a "What's Your Story" initiative for the state's libraries.

- 3.) Public library visits in Montana, on site and remote, increased from 3.8 per capita in 1998 to 4.1 per capita in 2005
- 4.) Nearly 3,000 people make use of MSL's Web site for "What's Your Story?" each month.

As reported earlier in this section, librarians reported that citizens value public library services. On the 2007 online survey of librarians, 47 percent of the respondents indicated *good progress* on the outcome "Montana citizens will report a higher quality of library services," with 40 percent reporting *significant progress* (n=332). For the outcome "Montana citizens will highly value library services," 50 percent indicated *good progress* and 37 percent reported *significant progress*.

A special assessment questionnaire was used for the What's Your Story? Initiative. About one in four librarians saw information on the Web site or attended workshops on the program, and 57 percent learned about it from state library employees. Among the respondents, 83 percent reported using the materials, programming ideas, and tools from the What's Your Story? Initiative. Posters had been used by all the respondents, and three out of four had used the bookmarks, programming ideas, and Web site for librarians. Over half used the sample letters, newsletter articles, and how-to guides. All the respondents agreed that the project Web site was well organized, contained useful information, and easy to use. All respondents said the PR tools and resources were used the most often on the Web site, followed by the how-to guides.

## **PROGRAM AREA: Access to information**

Access to electronic information is a priority for the Montana State Library, and considerable resources are dedicated to this effort. Guidance and direction in this program area comes from the Networking Task Force, a group representing all types and sizes of libraries in the state that advises the State Library Commission on matters pertaining to library automation and resource sharing. The Montana Library Network coordinates the statewide purchase of electronic resources so that these products are affordable for all Montana libraries and then provides easy access to these resources for Montana citizens. The Montana Shared Catalog brings the resources of libraries of all kinds together in a single catalog and has been

instrumental in forming new partnerships and cooperative efforts among libraries. State library staff offer training on a regular basis to librarians on using access tools and electronic resources available through the statewide program.

TOTAL FOR PROGRAM AREA: \$2,105,954

Montana Library Network (2002)	\$98,046
Montana Library Network (2003)	\$107,448
Montana Library Network (2004)	\$155,758
Montana Library Network (2005)	\$245,575
Montana Library Network (2006)	\$240,000
Montana Periodical Index (2002)	\$2,206
Montana Shared Catalog (2002)	\$180,000
Montana Shared Catalog (2003)	\$136,392
Montana Shared Catalog (2004)	\$106,536
Montana Shared Catalog (2005)	\$120,838
Montana Shared Catalog (2006)	\$70,000
Networking Task Force (2002)	\$6,708
Networking Task Force (2003)	\$5,874
Networking Task Force (2004)	\$3,000
Networking Task Force (2005)	\$4,500
Networking Task Force (2006)	\$4,157
Statewide Technology Consultants (2002)	\$97,500
Statewide Technology Consultants (2003)	\$97,500
Statewide Technology Consultants (2004)	\$97,500
Statewide Technology Consultants (2005)	\$141,416
Statewide Technology Consultants (2006)	\$185,000

**Goal:** Montana citizens have easy and complete access to the information they need at their libraries.

**Goal:** Citizens and students have easy access to and use multiple electronic information resources through their libraries.

**Goal:** Montana citizens can easily access the holdings of all Montana and OCLC libraries and online electronic resources through their libraries.

**Goal:** Montana citizens and students will have dependable access to electronic information services at their libraries by the end of 2007.

**Key outcomes:** Majority of library directors cite improved library services due to MSL efforts, Montana citizens and students use and value electronic information available through their libraries, and public library patrons report their libraries offer reliable and adequate access to electronic information and other resources.

Several key indicators show progress on these information access goals.

- 1.) At least three out of four Montana libraries participate in or use MSL technology/electronic information services. In 2006, 407 libraries are using InfoTrac. All public libraries and academic libraries are participants, with one half of the school libraries (51%) using InfoTrac and one half of the special/institution libraries participating. The school districts represented, however, serve the majority of the school population in the state.
- 2.) Montana residents have access to at least three additional full-text electronic databases.
- 3.) The number of searches using InfoTrac continues to grow. In 2003, 879,527 searches were logged. In 2006, the number is four times larger - 3,727,452 searches.
- 4.) The number of Montana libraries that have joined the Montana Shared Catalog increased each year, with 78 libraries currently participating.
- 5.) All Montana public libraries have broadband access to the Internet.
- 6.) MSL offers access to Montana-relevant bibliographic resources, as evidenced by the proliferation of OCLC subscriptions via the state. In 2006, 270 libraries are enrolled in OCLC. Of these, 123 are school libraries (22% of school libraries).
- 7.) All public and academic libraries participate in the statewide OCLC contract. Participation by school librarians increased by five percent each year.

## STATEWIDE TECHNOLOGY PRODUCTS AND SERVICES

The 2007 survey of Montana libraries asked about use of statewide technology, products, and tools. Among respondents, 83 percent use InfoTrac (n=365) and 54 percent use the Ebsco Automotive Repair Manuals (n=359). Three out of four libraries are using OCLC (and its suite of products) and over half use MLNCAT as a Web-based portal to Montana online resources. The online Montana Library Directory is widely used (75%, n=359), and 48 percent use the Montana Library Event Calendar (n=358). Ask a Librarian software is being used by about one fourth of the libraries (29%, n=354), and 31 percent are using BCR membership benefits for discounts on training and products (n=350).

When analyzed by type of library, academic and public libraries were the most likely to make use of the MSL technology, products, and tools. The Ebsco Automotive Repair Manuals were the most popular among public librarians. Among school librarians, InfoTrac is clearly the most used.

Library staff also were asked to rate the importance of these products and services. Nine out of ten rated OCLC (94%, n=359) and InfoTrac (92%) as *valuable*. Sixty-six percent rated OCLC as *essential*, and 53 percent rated InfoTrac as *essential*. The Montana Library Directory was rated *valuable* by 89 percent, and MLNCAT was rated *valuable* by 88 percent. Four out of five rated the Ebsco Automotive Repair Manuals and Montana Library Event Calendar as *valuable*, and seven out of ten rated Ask a Librarian and the BCR membership as *valuable*. When analyzed by type of library, the public librarians were more likely to rate the automotive manuals as *useful* and OCLC as *essential*. Among academic libraries, they were more likely to rate BCR membership and OCLC as *essential*. School librarians placed the most value on InfoTrac, and special/institution libraries highly valued OCLC and MLNCAT.

Survey participants were asked to indicate progress on three outcomes related to the access to information. The most frequent response on these three outcomes was *significant progress*. Nine out of ten respondents indicated progress on all three access to information outcomes (n=332). For the outcome, "Montana citizens and students have easy and complete access to the information they need at local libraries," 46 percent reported

*significant progress.* For the outcome, "Montana citizens and students use and value electronic information services available through their libraries," 45 percent indicated *significant progress*. For the outcome, "Montana libraries offer reliable and adequate access to electronic information and other resources," 48 percent reported *significant progress*. On the 2007 online survey of librarians, 47 percent of the respondents indicated *good progress* on the outcome "Montana citizens will report a higher quality of library services," with 40 percent reporting *significant progress* (n=332). For the outcome "Montana citizens will highly value library services," 50 percent indicated *good progress* and 37 percent reported *significant progress*. No significant differences were found in responses by type of library.

The results of patron surveys conducted in 2005 as part of the Gates Foundation Staying Connected program show positive responses among users to access to electronic information. Twenty libraries collected responses, with 395 questionnaires completed. Faster access to electronic resources was reported by 86 percent of the patrons, with over half indicating that access was *significantly faster*. Most of the users reported satisfaction with their access to Internet (94%), with 67 percent choosing the higher rating of *very satisfactory*.

## MONTANA SHARED CATALOG

The Montana Shared Catalog (MSC) is designed to promote resource sharing among Montana libraries. Nearly all academic, special/institution, and public librarians responding to the online survey were aware of the Montana Shared Catalog. Among school librarians, 86 percent were aware of MSC (n=143).

Participation in the Montana Shared Catalog has consistently grown during the past five years. Currently, 78 libraries are members. During Phase I (2002), 23 libraries joined. Over the next four years, 55 libraries were added to the shared catalog. Use of MSC also continues to grow. During 2006, approximately 750,000 searches were conducted in MSC.

Participants in the online questionnaire identified several benefits from the Montana Shared Catalog. Fourteen percent offered general positive

comments related to better library service (n=255). "I feel that because of MSC, we now can hold our heads high at any association or national conference and proudly say, 'I am from Montana, and we are at the top of the library world.'" "The benefits are enormous. It's really created a sense of Montana libraries as an interconnected system." "Residents of the state of Montana can see how useful their libraries can be to enrich their lives and provide lifelong learning opportunities." "The MSC is a great resource for librarians to utilize when all resources have been exhausted at the local level. It is amazing the wealth of information that is available to assist in our searches." One librarian explained the long-term impact of MSC. "Students from small schools benefit from using an online catalog when they go on to larger, more wired institutions. Since MSC libraries are online, ILL requests can be leveled so that the big libraries are not always on the hook for requests." Another reported, "Our library has transformed itself from a sleepy, little repository to a bustling, cutting-edge library services laboratory because of the MSC."

A key benefit reported in the survey is improved access to materials throughout the state (43%). "Montanans have access to a wider range of materials, allowing them to navigate effectively in this information age." "It is like having a giant library with millions of books instead of just those in a building in a particular town." "It opens up collections throughout the state. Patrons from the smallest community have equal access to resources as do those patrons of a large library in a more populated area." "It's one more step to making Montana a smaller state, increasing library access for our patrons at the local level." "It provides our citizens with a catalog of more than just their local library; [MSC] offers patrons a wider catalog of materials to browse." "As most of the schools in Montana are small and the funding is very sparse, the benefits of having materials available for all patrons with different interests is essential. These materials can be helpful for research, pleasure, or a means of continuing one's quest for a good read."

The MSC project also shows how it is more economical for libraries to share resources (32%). MSC provides a "broad array of titles and resources for the widest audience at a competitive price." "It is an excellent way to be able to share books and meet the needs of patrons without stretching the budget too thin." "The ability for libraries to share with one another is its

greatest strength. The cost for each library is reasonable because of this consortium."

Several librarians specifically mentioned how using a shared automation system made it economical for smaller libraries to participate (9%). "For smaller libraries, I think the benefits are tremendous. The sharing of equipment and expertise has allowed them to do things they would not have been able to do." "It permits for a much more sophisticated and cost-effective cataloging and resource sharing capacity than they would otherwise be able to afford." "Small libraries could not afford such a system on their own - neither the up-front costs nor the ongoing costs of maintenance and training."

The available technology expertise, through the state library and via networking among librarians, also is seen as an economic advantage for libraries (8%). "The technology support and expertise are invaluable. The consortia support and networking between libraries because of the MSC has been phenomenal." "The shared catalog takes the care and maintenance away from the individual libraries and turns it over to a person whose job is the care and feeding of the machine and allows the library to concentrate on assisting patrons." "This is a state comprised of small libraries that are widespread. Many of us are asked to work beyond our means with respect to time, money, and often ability. MSC gives us all a chance to connect, which is vitally important." As one person expressed it, the result of all this support is that "staff is more efficient, happier, and more productive, with more time to assist users."

The ease of access with one-stop searching was highlighted as a key benefit (18%). Librarians also reported that patrons benefited from more convenient and faster access (10%). "There is great benefit for the citizens of the state of Montana. It allows them from the comfort of their homes to search many libraries across the state and get the materials they need through interlibrary loan quickly." When asked specifically about the impact of MSC on the local library, better local collection development was cited (13%, n=113).

A limited number of ideas for improvement of the Montana Shared Catalog came from respondents of the online questionnaire, with only about a quarter

of the people making suggestions. The most frequent concern related to the cost of participation (31%, n=102). This included the ongoing cost as well as initial costs to join. MSC was encouraged to expand membership to keep individual library costs down. There was some concern about the downtime of the system (12%). The only other issue raised by at least ten percent of the respondents was a need for a better delivery option or funded courier service to help meet the demand for ILL (10%).

### **PROGRAM AREA: Montana Talking Book Library**

The Montana Talking Book Library provides free and easy access to reading materials to all qualified Montana residents who because of a disability cannot use standard print resources. Services include audio books, magazines, and newspapers in various formats; appropriate reading equipment; delivery of materials; and reader's advisory from MTBL staff. MTBL continues to explore using digital and online talking books for patrons interested in these special formats.

**TOTAL FOR PROGRAM AREA:**           **\$867,356**

Montana Talking Book Library (2002) \$171,329  
Montana Talking Book Library (2003) \$171,329  
Montana Talking Book Library (2004) \$182,046  
Montana Talking Book Library (2005) \$171,326  
Montana Talking Book Library (2006) \$171,326

**Goal:** To ensure that all eligible clients know about the availability of services from the Montana Talking Book Library (MTBL) and to make enrollment and use of the service easy for users.

**Key outcomes:** High degree of patron satisfaction and use results in a higher quality of life.

The 2007 telephone interview with users showed an extremely high level of satisfaction with the MTBL services. This was echoed in the WebOPAC online questionnaire. Patrons described clear benefits from use of Talking Books in the interviews and online questionnaire. [See Section IV for a detailed discussion of MTBL outcomes.]

**Goal:** MTBL will plan and implement a smooth transition to a digital format to ensure that the potential for expanded services are available to MTBL patrons.

**Key outcome:** Users will report that the transition has led to improved services.

The availability of the digital format is still limited, so progress on this goal is limited. The MTBL has conducted a demonstration project with 40 users. There was almost no awareness of this format reported in the 2007 telephone interview with MTBL users. MTBL has been digitally recording Montana authors, although these also are being transferred to cassette.

**Goal:** Allow service to the patrons to be provided more efficiently and effectively by providing enough space for the collection.

**Goal:** Increase productivity and satisfaction of staff members and volunteers.

**Key outcome:** Staff and volunteers rate the changes/workspace as enhancing productivity.

To make progress on these two goals, MSL remodeled the MTBL workspace, including the collection area. Interviews of staff by a consultant for National Library Service (NLS) indicated improved satisfaction and productivity by staff and volunteers. The remodeled space and streamlined operations have received a commendation from NLS.

**MONTANA STATE LIBRARY  
LSTA EVALUATION  
SECTION III**

The Montana State Library supports continuing education for public librarians and trustees with LSTA funds. These activities support one of the goals in the state's LSTA long-range plan: "Montana public librarians and trustees have easy access to the training they need to provide quality library services to their communities."

The state library sponsors a summer institute each year, which offers public library directors classes on leadership and management skills in a developmental sequence. A fall workshop offers a mix of workshops on varied topics to meet the diverse learning needs of Montana librarians. Regular trustee training addresses key skills needed by trustees to set direction for the work of the local public library. This section does not address the extensive training conducted in relation to the development of the Montana Shared Catalog and other technology initiatives.

Participants consistently rated the quality of the learning experiences very highly. In all cases, the majority rated their learning experiences as excellent. MSL is conscientious in its responsibility to provide quality trainers from within Montana and around the United States.

The state library and its constituency have a key issue to overcome when delivering continuing education - the sheer distances people have to travel to participate. While the state library works to offer training in different locations, the low population density in most of the state does not make it practical to schedule in-person trainings in some areas of the state. The involvement of librarians and trustees in training, given the amazing time commitment just to travel to events, indicates a strong commitment to lifelong learning among this group.

Workshop evaluations, follow-up assessments, and a 2007 online questionnaire were used to complete this evaluation. MSL selected some of the training events for OBE activities. This follow-up information was

collected with a questionnaire sent to participants several months after the event. This summary highlights specific examples of how learning was applied. This illustrates the impact of the MSL training efforts.

### **Summer Institutes**

The summer institutes bring public library directors and trustees together for several days of intense training on selected management and leadership topics. A major component of the institute is the opportunity to network with each other to share experiences and brainstorm solutions. The 2002 and 2003 summer institutes were funded by the Gates Foundation and are not discussed in this evaluation.

#### **2004**

The 2004 summer institute focused on strategic planning. Each person completed three projects during the week: a plan for implementing a planning process, a draft of a new or revised policy, and an oral presentation on the library budget.

Twenty-eight attendees from 22 libraries participated. Each participant spent 35 hours in class for a total of 980 hours of instruction. Participants traveled a total of 11,490 miles or an average of 322 per person to attend the training. Three participants registered for two college credits for the institute. Most reported meeting their personal learning objectives (81%, n=26) and 88 percent felt the training was worthwhile. The institute was exemplary because it addressed a real, identified need, and it brought libraries and communities closer together working toward a set of mutually recognized goals. The comments show an appreciation for the networking among directors that occurred at the institute. Among the comments from the evaluation were the following.

- Great networking. I met new directors and learned a lot from trustee remarks.
- This was a most practical workshop! [It was] very good to actually do the activities and work on forms.

- Excellent week of instruction. Even though the amount of information and resulting potential work is almost overwhelming, I feel I have the tools/knowledge to move forward.
- I will take this all back and get right to work! I learned more in this one week than any one management class taken at the graduate level.

A follow-up assessment was conducted in 2005 and showed clear outcomes from the summer institute. Four indicators of outcome were used. Almost all participants formally shared planning information with the staff and/or library board (96%, n=24). Three out of four participants had identified key community stakeholders following the workshop (75%). Four out of five made changes in "sacred cow" programs or services identified in the library (79%). Three quarters of the attendees carried out at least one planning step after the institute (75%). In one library, they held "brainstorming sessions with staff and separately with trustees." They "listed needs of the community and how the public library can help." Another reported that "in all probability, our library's role is going to shift from providing materials for enrichment and recreation to being a community referral, resource, and coordination center." "The Forsyth community assessment helped us clarify our position in outreach programs beginning with preschool story times, programs for grade school students, teen outreach, and continuing education for adults. The assessment and planning process greatly enhanced our position." "The strategic planning process, surprisingly, has helped our board define exactly what its responsibilities are and has helped in the budget planning process." "We have a plan for the next year in place. We are reorganizing our policies and procedures, revitalizing the Friends, and focusing on automation fundraising for the current year."

Some of the "sacred cows" that were challenged after the training included "heavily weeding" the Montana collection and "integrating it into the regular nonfiction collection." "Staff are coming to realize that quantity does not mean quality, and all collections are being weeded." "We *select* books from donations. The library used to put every donated item into the collection." "Immediately after returning from the Summer Institute, I weeded the reference section to one-third its previous size. I haven't missed anything that was weeded." Another library saw as its sacred cow "that there positively must be a reference section with nothing from that section

allowed for check out. Bah! I whittled that section down, placed reference right with nonfiction, and allowed materials to be checked out by patrons."

"We identified the policy that didn't allow kids under the age of 14 to check out videos without parental consent as a sacred cow. Age 14 was an arbitrary age with no basis. We have changed the policy." "We allow noise and refreshments." Some libraries reduced their holdings of back issues of magazines. "We subscribe to InfoTrac, so there is no need to keep back issues as reference because of the occasional request to photocopy an article." One librarian described how one change had a ripple effect in the library.

*New books have been relocated near the circulation desk onto custom-made shelving. Paperback racks have been moved, and a contemporary unit was purchased to replace another rack. It found a happy home in local business as a trade for different signage. Moving the paperbacks freed up space to transform the AV section into a much more contemporary area. Audio cassettes will be repackaged into book-like containers and shelved with the CD books. The new area also incorporates a music CD cabinet that is a new service for us.*

Another example of the impact of the training is described by one public librarian.

*I learned more last week than I could every have imagined, and I've already put some of the training to use. I look forward to beginning a community visioning process ... and using the planning toolkit to realize a strategic plan that meets the needs of the Valley's residents. As a result of [the] training, about 25 libraries will now have the tools to identify the library's needs of their respective communities and can respond to those needs by reallocating staff and budget to improve services. Pretty amazing.*

Another librarian noted that she had received the "gold standard in training on strategic planning and policy development ... I look forward to using what I learned last week in developing plans and policies that will position our library for a more effective future."

## 2005

Based on feedback from the 2004 summer institute, MSL offered the 2005 summer institute in two locations. Further, because the length of the institute was a barrier to attendance, the length of the training was reduced to three days. The content of the 2005 institute again focused on long-range planning. Each participant completed two exercises: writing a plan for how the library would initiate planning and making an oral presentation related to the library budget.

There were 32 attendees from 23 public libraries. This total included seven trustees. Each participant attended 26 hours of training, for a total of 736 hours. The group traveled a total of 6,908 miles or an average of 216 miles per person. Five participants received one hour of college credit for the institute. All participants reported that their personal learning objectives were met. Four out of five participants gave the institute an overall rating of excellent (84%) and the rest rated it as very good (16%).

All participants were able to identify ways they would use what was learned at the institute. Understandably, most of these strategies linked to planning activities. This range of comments indicates the types of activities that result from effective training.

- I will use the timeline to get going on the process. I will use the 'managing change' sheet for a staff situation.
- I need to get my board to set some goals so they know why we are heading in a certain direction.
- Institute a process for planning change, rather than letting change manage the organization!
- This program gave me questions I want to ask about current operations and the desire to help my library move forward.
- Explain to my board and director the overall thrust of *Planning for Results* and generate enthusiasm to begin.
- Take a "longer" look at what needs to continue or change to keep us going forward.

One participant reported via email that "I have encouraged my board to read and analyze the ways we can use the community approach, assuming the

library as our community. It is not always the case that such a presentation is instantly applicable, but in our situation, it absolutely is."

To further assess the outcome of the summer institute, a follow-up questionnaire was sent to participants. All the respondents reported sharing what was learned about planning and policies with library staff. Half of the participants have identified key community stakeholders to involve in the planning process (53%, n=17). About one-third have started an assessment process for their communities (35%). One library's planning experience illustrates the positive effects of planning.

*We held two day-long sessions. We have identified rooms and other areas that need remodeling ... We now do press releases and publish our community meeting calendars routinely to increase awareness. We have engaged many new volunteers to participate and share their talents. It makes a community (village).*

## 2006

The summer institute was attended by 51 librarians and trustees. It featured an orientation for new public library directors, creating an action plan for specific projects, recreating your library space and personality, and effective security and handling of problem patrons.

Dealing more effectively with security issues was clearly the most useful component of the training, as nearly three out of five will make changes related to security and safety following the workshop (58%, n=31). "I will urge the staff to brush up on security and handling patrons in general." "I will be continuing my efforts to improve library safety and security by putting policies and rules in writing." "Establish a safety awareness procedure check list." "I have already put security on the agenda for our next board meeting."

The session titled "mildly delirious libraries" also will affect library practices. This session used the GASP principle (graphics, ambience, style, presentation) to help libraries consider ways to redesign the library's space, image, personality, and customer service attitudes. Nearly one-third of the participants reported that they would be using the GASP principles at their

libraries (29%). As one librarian concluded, "mildly delirious will be implemented ASAP - come by and see the changes!"

## Fall Workshops

Each year, MSL provides a fall workshop that offers a range of topical workshops of interest to librarians from all types of libraries. The topics vary based on interest and need. Each year, the format is similar with sixteen three-hour classes.

### 2002

The 2002 fall workshop featured training on book mending, core values in libraries, emergent literacy, problem patrons, managing volunteers, space planning, library foundations, and statewide databases. In addition to the workshops, the presenter on space planning conducted individual consultations with a dozen public library directors.

The fall workshop was attended by 77 people, with 45 public librarians, 14 school librarians, 9 academic librarians, and 9 special librarians. These librarians traveled a total of 23,000 miles to attend the workshop, with the average distance traveled being 304 miles. An estimated 636 hours of training were attended during this event. Three out of five participants completing the workshop evaluation form rated their overall experience as excellent (60%), with another 35 percent rating it as very good.

Three training activities from the fall workshop were chosen for follow-up evaluation activities: book mending, use of InfoTrac, and problem patrons. Three questionnaires were used to gather outcome information.

In January 2003, participants in the book mending workshop were asked about their learning. Nine out of ten were better able to determine if a book repair was appropriate (88%, n=25). Nearly half were able to answer 80 percent of the assessment test questions about book mending (48%). Librarians made it clear that they prefer hands-on workshops on topics like book repair.

In February 2003, nine out of ten respondents to a questionnaire about the InfoTrac training indicated they were more comfortable using the database (93%, n=15) and three out of five said using it was easier as a result of the training (60%). Nearly half reported more successful results when searching InfoTrac (47%). Only 13 percent reported it was faster to use the database as a result of training. If the resource is not being perceived as being faster, librarians are not likely to use it. Two out of five reported using the database once a week (40%), and two people reported using the database more than twice a week. The MSL learned that it is not enough to just teach library staff how to use the database. They need to demonstrate the value of the content and market its usefulness to patrons.

In April 2003, a questionnaire asked about application of learning for the problem patron workshop was distributed. Four out of five participants indicated that as a result of the training, they were better able to identify a problem patron situation (84%, n=19). Ten of the respondents had a problem patron situation since the training. Of these, seven were better able to identify a problem patron and use new skills to diffuse the situation. One illustration of the impact of this training is described below.

*I could not for the life of me understand why certain patrons would treat me just awfully and get in my space. I had one patron actually touch me. I was unable to say no or protect myself. I brought this up before the panel, and they gave me several good ideas and tactics to use, including learning to say no. They also suggested that I and anyone in the group that may have this problem with patrons should take an assertiveness workshop. After a four-week workshop, I have had more people say I look different or what have I done that makes me look so different. This workshop changed my life, and I need to keep practicing.*

## 2003

The fifth annual fall workshop (2003) featured thirteen, three-hour classes. Training topics included change, digital image databases, telephone etiquette, CIPA, collection development, marketing, customer service, library-community partnerships, Microsoft Access, weeding, policies, the future of libraries, and young adult services.

This 2003 fall workshop was attended by 87 people, with 59 from public libraries, 15 from school libraries, 1 special librarian, 11 trustees, and 1 library lawyer. These attendees traveled a total of more than 28,000 miles or 467 hours to attend the workshop, with the average distance traveled being 330 miles. An estimated total of 930 hours of training occurred during this event.

The skills and knowledge learned at the institute that were the most applicable to the local library situation were related to weeding (40%, n=35), customer service (29%), and using Microsoft Access (26%). When asked about what would be implemented as a result of the learning, the same pattern occurred, with the most people indicating weeding activities (28%, n=40), using Access (20%), and customer service improvements (18%). Five people will review and improve library policies. A range of comments illustrate the learning and impact from the fall workshop sessions.

- From the customer service video on ten commandments for communicating with people with disabilities, I learned several hints for interacting with the disabled.
- The library walkabout was great. I am going to take the worksheet back and walkabout ours.
- Rethinking the "shelving" of picture books - changing to bins - and making the library more aesthetically pleasing.
- Changing the atmosphere of the library and being able to weed the collection without guilt!
- Redoing our collection management policy, making it more detailed and exact.
- Make serious plans for use of the young adult room now empty and waiting for its first use.
- Having just gone through an extensive weeding process, I needed her thoughts on continuous maintenance and improvement.
- I hope to convert some of my Excel data to Access and establish it as ongoing assessment of my collection.
- I will use Microsoft Access to do reports and queries for our video collection. I will also be able to teach others in the library how to use it.

Three sessions were chosen for follow-up outcome evaluation: weeding, customer service, and Microsoft Access. Questionnaires were sent to participants in these three workshops in January 2004.

For those in the weeding workshop, all participants indicated that as a result of the training they were better able to identify elements for deciding on deselection. Three out of four learners were able to list at least two resources to help in weeding decisions (74%, n=19). The information from the training was clearly put to use, as almost all the participants had undertaken weeding activities since the workshop (95%). Four out of five named specific parts of the collection where the deselection criteria were being used (79%).

Participants in the customer service workshop were better able to identify library characteristics that detract from good customer service (94%, n=17). All participants reported understanding the characteristics of good customer service. Nine out of ten were able to name at least two environmental characteristics that contribute to good customer service. Four out of five reported making someone with disabilities more welcome in the library after the training and were able to describe improved service based on what they learned (82%). Nearly half used the Walk Around worksheet upon returning to their own libraries (47%).

The "Using Microsoft Access" session helped most participants understand the Access terminology (86%, n=14). Three out of five reported they were able to create a simple Access database and accurately described what an Access query does (64%). Five people had developed a database using Access (36%). The problem for some was finding the time to immediately use their new skills. Access is a complex program, and it may require more follow-up instruction to reinforce what was initially learned. The large waiting list for this workshop indicated the high level of interest in this topic. As a result of this, MSL offered four additional hands-on workshops on Access throughout Montana in March 2004.

## 2004

The 2004 fall workshop follows the pattern established in earlier workshops. Training topics included using the Dewey Decimal System, online health

resources, automation update, fundraising strategies, building a library Web site, services for teens, marketing, mending books, customer service, time management, and handling challenging situations.

This workshop was attended by 114 people, with 75 public librarians, 18 school librarians, 5 academic librarians, and 6 special librarians. Three combined school/public libraries were represented, and seven trustees and one library lawyer attended. These people traveled more than 33,700 miles to attend, with an average distance traveled being 296 miles. An estimated 1,095 hours were spent in training. Seven out of ten rated the learning experience as excellent (72%, n=32).

The knowledge and skills that were the most applicable to the local library situation included the topics emergent literacy (36%, n=47), teen space and programs (26%), and marketing (23%). Fundraising and working with Friends groups were cited by 19 percent, and customer service and legal access to library records were each listed by 17 percent of the participants. Time management and web site development were both identified by 15 percent.

Implementation plans paralleled the list of most applicable topics. Activities related to raising readers (emergent literacy) and teens were the most frequently mentioned (26% for each, n=53). Improving customer service (17%), more marketing (15%), and better time management (13%) round out the top five list. "I will try to always 'exceed expectations' in customer service and daily ask myself 'is this the best use of my time right now?'" A librarian planned on "renewed efforts at superb customer service." "I will look at and serve the customer, no matter who they may be when they are ready. Shelving, like housework, can wait." One person planned to "adjust, alter, and add to the children's story hours." "The skills learned through the emergent literacy program can be used in the library curriculum in our school." Another wrote, "I have a list of ten things to do to improve teen space and services when I return!" One library will "empty two closets in preparation of moving stuff to begin my new teen area."

## 2005

The seventh annual fall workshop (2005) incorporated programs on blogs, Friends groups, subject headings, adult programming, patron surveys,

change, emotional intelligence, collection management, long-range planning, readers advisory, books and babies programming, teambuilding, using InfoTrac, value of school libraries, and senior programming.

In 2005, 110 people participated. This included 68 public librarians, 12 school librarians, 3 academic libraries, and 5 special librarians. Three combined school/public libraries were represented, and 18 trustees attended. These attendees traveled more than 31,000 miles to attend, with the average travel distance of 285 miles. A total of 1,020 hours was spent in training. Four out of five rated the experience as excellent (81%), with the remaining participants rating it as very good. One school librarian noted that "I really enjoy coming at the first of the school year for workshops. They are more beneficial for school librarians than at the end of the year in April for state conference."

Reflecting the diversity of topics at the fall workshop, participants reported a range of improved skills and knowledge that is applicable to their libraries. The largest number of learners will be using information from the marketing session (25%, n=57). Information on using blogs will be used by 19 percent of the respondents. "We will use the blog to add current information about our library." One out of five will be working to improve team work (21%) by "setting ground rules in teams and recognizing the team process" and "recognizing team dynamics." Eight people mentioned the value of improved readers advisory skills. "I really needed the readers advisory information. I hope to be able to help the patrons more." "Challenge yourself by reading outside your comfort zone." Seven participants felt the emotional intelligence session will help them cope with workplace situations. "I will try to have honest communication with supervisors and staff and will try to recognize other's emotional states." Using surveys and creating books and babies programs were listed by six people.

A similar pattern emerges in response to the question, "What will you do differently at your library?" All the areas identified in the previous paragraph appeared in these answers, with total responses ranging from four people each for books and babies programs and emotional intelligence to seven participants listing marketing and team work.

## 2006

The most recent fall workshop included several technology-related classes, including trouble shooting computers (beginning and intermediate), managing digital content, PowerSearch, TERC database, and developing Web pages. Other topics covered were teen programming, answering mental health questions, creativity, planning for the future, meeting etiquette, collaboration, weeding, and marketing.

A total of 107 people attended, with the programs on young adult services garnering the largest attendance and most positive ratings. Half of the participants rated the fall workshop as excellent (n=46), with 47 percent rating it as very good.

Given the variety of programs, it is not surprising that participants identified a wide range of new or improved skills and knowledge as a result of participation. Learning was described in all the content areas of the fall workshop. When asked what they will do differently at their libraries as a result of the workshop, a similar range of ideas emerged. Two out of five of the participants will apply their learning related to technology (42%, n=72). These activities will include better searching of databases, improved maintenance on computers, and use of WebJunction. In this group, nine people specifically mentioned creating a new Web site for the library.

Several described changes in behavior related to serving young adults (31%). New teen programming was highlighted, but some also reflected on a need for a more positive response to teens in the library. "Try to communicate with teens more and find out what they want from the library." "Try to have all staff be more informed about our teens and teens in general." "Work on staff development about rules, fairness, and respect with young people." One person desired a "positive redirection of any negative teen behavior," while another will "encourage my staff to interact more with young adults."

Planning, with an emphasis on action planning, is on the agenda for 15 percent of the group. Work on weeding the collection is scheduled for a similar number of people (14%). "I'm going to apply some new weeding strategies." One person will "weed the collection more thoroughly. I now know what I can and should weed and what I should keep."

Three classes were chosen for further evaluation of impact. Follow-up electronic questionnaires were sent to participants in the two computer troubleshooting sessions and the Web page session.

For the beginning computer troubleshooting workshop, four out of five were able to name at least one Windows utility that will help in with Internet access (83%, n=12). Nine out of ten were able to name software utilities used for spyware removal (92%). Half of the participants in the beginning computer troubleshooting workshop reported making use of the content, including how to work with computer printers (n=14). "I was able to go in and use safe mode startup to troubleshoot. This was all fairly new to me." "I implemented several of the skills learned - ordered new software [and] updated every computer." "I can gather information about a problem. I can run updates for DeepFreeze." "I learned that when our computer has deep freeze not to just unfreeze it for one reboot. In order for the updates to take effect you must leave it unfrozen for a couple of reboots." Among those that had not used the information, most noted that the "opportunity to use new skills just had not presented itself." Half of the respondents also reported feeling more confident about their skills and abilities to communicate with tech staff.

The results of the follow-up questionnaire on the intermediate troubleshooting session were very similar. Four people described specific uses of the information (n=8), and all knew the purpose of a firewall. As with the first workshop, increased confidence and ability to communicate with tech staff were highlighted as the greatest benefit of participating in the training.

The effects of the Web page workshop are simple to illustrate. Four out of five participants have either created or will be developing a Web page for the library (78%, n=9). Most are using Google's Page Creator to complete the work.

### **Trustee Training**

Montana State Library had not done formal statewide trustee training for several years, so in 2002 they began working regularly with this

constituency. The purpose of these workshops is to bring trustees and library directors together for formal training and networking in order to address critical board issues and consider possible solutions.

## 2002

In 2002, the trustee workshops were held in two locations in the state. Topics included board operations, governance, library advocacy, and the relationship between the board and library director. MSL staff updated participants on library districts and library finance.

A total of 73 people attended the workshops, with 52 trustees, 19 library directors, and two library Friends members. Attending the workshop represented a considerable commitment of time and travel expenses for trustees. A total of 15,832 miles were traveled or an average of 217 miles per person. Travel time and attendance totaled 842 hours. A formal evaluation was used after the Billings workshop and showed a very positive response to the training. Eight out of ten participants rated the experience as excellent (82%, n=33). All but one rated the information on board and governance as excellent.

The trustee training showed the library community that the state library is aware of the important role trustees play in delivering quality library services locally. Besides providing trustees with useful skills and knowledge, the workshop had the added benefit of creating a network of trustees. This lead to programming for trustees at the 2003 fall workshop and an increased number of invitations for MSL consultants to attend board meetings and make presentations. These invitations indicate a renewed spirit of cooperation and a realization that both entities are working toward the same goal.

## 2004

A one-day workshop on library advocacy was held in two locations during the fall of 2004. These workshops were attended by 60 people - 45 trustees, 13 library directors, and two Friends members. Participants traveled a total of 12,158 miles to attend and spent 560 hours in training. Three out of four

participants rated the training as excellent (76%, n=41), and the rest rated it as very good (24%).

To help document outcomes from this training event, MSL used a follow-up questionnaire; information was gathered on the impact of the trustee training. Seven out of ten people understood the difference between advocacy and public relations as a result of the training (69%, n=26). As one person summarized, "Advocacy - building partnerships, finding champions, and collaborating. Public relations - telling who, what, and when we do it to the public."

Two out of five participants formed at least one partnership between the library and another community group or organization following the workshop (42%). Among the partners mentioned were the health department, hospital, schools, historical society, chamber of commerce, and newspaper. Nearly half of the attendees had met with an elected official to educate him/her about the library and its value after participating in the training (46%).

Clear outcomes occurred as a result of this workshop, but ongoing training on advocacy is likely needed to help trustees in their roles as library advocates. Most had not moved forward on creating an advocacy plan, partly due to time constraints.

A related project was the development of the Public Library District Handbook. The purpose of the handbook is to describe the advantages of forming a library district and the legal steps required to make this change. It is distributed at no charge to librarians, trustees, and city and county officials. The 800 copies produced continue to be distributed throughout the state.

## 2005

The 2005 trustee workshop looked at evaluation from two perspectives - evaluating library services and evaluating staff, in particular the director. One session was held, with 40 participants. Two out of three participants rated the workshop as excellent (67%, n=33), with the rest rating it very good.

Participants were asked about what would help them the most in their present library situations. Some noted learning related to evaluating the library, such as using existing information, analyzing the annual report data, and telling the library story. "I like the concept of asking 'why' when evaluating procedures." "Simplicity and specificity are worthy goals. Enough information is enough to make a decision." Most of the participants identified improved knowledge of personnel evaluation as a major outcome of the workshop. The principle of continuous feedback, focus on behaviors, and specific criteria were seen as helpful, especially for evaluating the library director. "Do more frequent observations of the director and give immediate feedback." "Our last director's evaluation was ineffectual because it was not very specific or helpful as far as constructive feedback to the director." "Reinforced the importance of evaluation - both giving it and receiving it."

The trustees and librarians were very specific about what they would do differently at their libraries as a result of the workshop. Related to the morning session on evaluating services, participants chose a variety of ideas to use. "Gather statistics for evaluation purposes, not just because it's always been done." "Spend more time looking at my library analytically - how patrons are treated, reactions to the collection, etc." "Ask the board to look at the annual report and to do a more systematic evaluation of library services." "I have a clearer picture of what the trustee's responsibility is in observing the overall running of the library - not hands on, but the ability to observe, comment on excellent work or areas that could use improvement." One person simply concluded that "maybe a few sacred cows will be shot."

Board members at the workshop reported a clearer understanding of their role in providing feedback to the director. Several noted that they would be improving their evaluation of the director and re-examining the process and forms used for that evaluation. "I will give the director more, direct, specific, and timely feedback that will help her do her job better." "Review our evaluation form together and make it more specific - what the rating scale really means." "Ask the board to set a list of behaviors to evaluate the director." "Work on a good, up-to-date job description for the director."

MSL conducted a follow-up evaluation in early 2006 to document outcomes from this trustee training event. All respondents were able to explain why it is important to evaluate the library's services, with a strong emphasis on meeting the needs of the service community. The concept of evaluation also is linked strongly to communicating the library's story to a variety of stakeholders. A sampling of the comments illustrate this learning.

- It is too easy to fall into the "that's how we've always done it" mentality.
- To aid the board and director in planning and troubleshooting and to prove accountability to funding bodies and taxpayers/patrons.
- It is important to evaluate because the trustees can see if the library is keeping up with the times. Also, they can see if the director is doing the job he was hired for.
- So that the institution can stay healthy and current with what is happening across Montana and the country.
- To determine the effectiveness and efficiency of the library operations, to define and describe the library's role in the community, and to assess the accomplishments of the library and its planning process.
- To see where we are going, why we are going there, and what we can do differently.
- To understand if we are meeting the spoken and unspoken needs of the community and to measure if we are meeting our internal objectives.

Nine out of ten participants shared the information with their library boards (89%). Three out of five reported plans to evaluate a library service in the next three months (61%), with some linking this to library planning efforts.

A significant outcome from this training is a change in evaluation of the library directors. Most reported that they would be using information from the workshop to help in the process (89%). Some will use the portfolio to support the evaluation process. One person concluded, "Originally the evaluation was done to be encouraging; now it will be brought to a realistic level." "The advisory board will set specific goals for the branch director." "Previously, the library director was only evaluated by the principal. Through

the seminar I learned that ... we need to have joint evaluation between the board and the school. We have amended the agreement with the school to accomplish this change." Six of the library directors present at the workshop also reported improving staff performance appraisals. "The workshop information that will help is in designing a new evaluation form, helping with documentation, and also creating staff portfolios." "As with library evaluation, stated responsibilities give me a way to measure an employee's work."

Another approach to trustee training in 2005 was the Library Board Education Program (LBEP), which trained volunteer library trustees to present basic board workshops around the state. This "train-the-trainer" approach was designed to expand training to library boards beyond what MSL staff could provide. Five trustees participated in a two-day trustee institute. In just four months following the training, these trustees did 15 workshops across the state educating 90 trustees on basic board skills and related topics. This resulted in 330 training hours.

Trustees responded favorably to training presented by peers. In written evaluations gathered from 11 of the LBEP sessions, half of the trustees said the training exceeded expectations (52%, n=63), and 46 percent felt it met expectations. As a result of the training, board members felt more knowledgeable about their jobs (95%, n=57), with 37 percent describing themselves as "very knowledgeable." While there was marked improvement in the understanding of library law by trustees (76%, n=42), one out of four needed more training in this area. Most reported feeling only adequate about their knowledge of library law (62%). For those boards that used the vision exercise, 93 percent found it helpful (n=44).

## 2006

The two trustee workshops in 2006 focused on fundraising. A total of 65 people participated in this training. The participants rated the workshops highly, with nearly three out of four giving it an excellent rating (74%, n=57). The remaining participants rated it as very good.

Participants described a variety of learning areas. Just learning to ask for funds was key for several, and some trustees noted an improved

understanding of their role in fundraising for the library. One trustee concluded, "I will pay more attention to my obligations as a trustee to donate personally and be more active in fundraising events." Another participant remarked on "how poorly prepared public library staff and trustees are to undertake such an effort. Our mindset is not sufficiently marketing/sales oriented." "We need to get over the 'volunteerism' mentality and become more professional and competent [with fundraising]." Creating a plan for fundraising and working collaboratively were identified as important strategies. "I have a better idea of how to work with our enthusiastic Friends to focus our collective efforts."

When asked what they would do differently as a result of participation in the workshop, the most common response was to take the information back to the board and begin reassessing what was currently being done. Several noted working on a plan for fundraising, while others focused on the need to build better relationships with current and potential funders. "We need to look at patrons and potential donors as people who will want something. It's important to find out what they want." "Be more outspoken and assertive; nurture relationships." "It made me really start to think about the importance of thanking people more than once and sharing future successes with them at times when you are not asking for money." "Approach [potential donors] in ways more appropriate for each individual." In general, people reported a renewed enthusiasm for fundraising. "I will go back fired up to do something."

Because these workshops occurred late in 2006, the follow-up assessment of outcomes will occur later in 2007. A written questionnaire will be sent to the trustees who participated.

### **Outcomes of MSL-sponsored Training**

An online questionnaire was used to gather additional information about the MSL training program. The survey was conducted in January and early February 2007. A total of 394 usable questionnaires were completed, representing library staff from all types of libraries. The most responses came from the school librarians (40%), followed by public librarians (36%), academic librarians (15%), and special/institution librarians (9%).

MSL training events are utilized by all types of library staff. These training events include the activities described in this section along with an array of training related to the Montana Shared Catalog and MSL technology products. Two-thirds of the respondents reported attending at least one MSL training event in the last three years (66%, n=382). One third attended one or two events (33%), and 21 percent attended three to five. Twelve percent attended more than six events. When examined by type of library, school librarians were the least likely to participate (48%, n=149) along with academic library staff (43% had attended no MSL training, n=58). Public library staff were the most likely to participate (87% attended at least one event, n=138) and over half attended three or more events in the last three years (58%). This is a logical outcome given the focus of training on public librarians and trustees by MSL.

The results show that the MSL training is seen as useful by most of the library community. Only five percent rated the training as *not useful* while 18 percent rated it as *extremely useful* (n=326). The most frequent response was *very useful*, with 41 percent choosing this rating, and 27 percent chose the *useful* rating. When examined by type of library, the most frequent response was *very useful* by all but the school librarians. Three out of four public librarians rated the usefulness as *very* or *extremely useful* (75%, n=126) and no one indicated that the training was *not useful*. Over half of the academic librarians rated the usefulness as *very* or *extremely useful* (55%, n=49), and half the special/institution librarians had the same response (50%, n=34). School librarians were the most likely to rate the training as *not useful* (9%, n=117), but nearly half still gave *very* or *extremely useful* ratings (48%).

Respondents also were asked about the importance of the training offered by MSL. In this case, 97 percent feel it is an important service from MSL (n=354). Three out of five people rated training as *very important* or *essential* (31% for each rating). When examined by type of library, the public library staff were again the most likely to give high ratings on importance with 47 percent rating the training as *essential* (n=132). No public library respondent chose *not important* as a response. Special/institution librarians most frequently chose the *important* rating (40%, n=35), although another 37 percent chose *very important*. The academic librarians also most frequently chose *useful* (37%, n=52), but over

half selected either *very useful* or *essential* (56%). The most frequent response for school librarians was *important* (34%, n=135), but nearly half gave either a rating of *very useful* or *essential* (49%).

The results on these two questions on the survey discussed above support the conclusion that continuing education is a useful and important function of the Montana State Library for all types of libraries and trustees.

Multiple comments reinforce this conclusion. As one person expressed it, "The role and work of a library changes very quickly. We cannot stay current in all aspects of this area and look to MSL to assist us. In Montana, where there are few libraries and few opportunities for education, it is ESSENTIAL to have this resource." A sampling of comments from library staff in all types of libraries shows the value placed on training in the library community.

- I believe the opportunity to learn from others is invaluable. An awareness of public needs as well as our close knit college community is important. We can't be all things to all people, but new ideas in handling issues with patrons have been very helpful.
- The sessions that focus on skills like interpersonal communications or the future of cataloging have an impact that is not immediately realized. These types of sessions assist in making future informed decisions that impact service to patrons.

#### POTENTIAL CHANGES FOR MSL TRAINING

When asked about changes to the MSL training program, three out of five respondents had no suggestions for improvement (61%, n=394). As one person summarized it, "just keep offering training." "I can't think of any changes. The trainings have always been helpful." "They are very good. Job well done!" One school librarian concluded, "I appreciate how most all trainings fit the needs of almost all libraries in Montana, including mine." "The MSL training staff do a good job with what funding they have, especially considering the vast distances in the state." "MSL is doing a superb job in providing training to the Montana public sector." "In a dream world, I would like to have all training available in my tiny town so no travel would be involved. I think the MSL has done a terrific job making training accessible throughout the huge state of Montana." "The training sessions I

have attended have been very beneficial and worthwhile." One person summed up the positive view of MSL's training efforts.

*Having been in another career previously and having attended continuing education most of my adult life, I can say that the MSL training is one of the best I have experienced. It is well planned and organized. Topics are cutting edge, and speakers have been very articulate. It is an excellent educational effort.*

The strong level of satisfaction is clearly documented by the results of the online survey. Of course there is always room for some improvement, as illustrated by this comment. "If it's at all possible, ... we need more chocolate at the events."

Ten percent of those with suggestions for improvement wanted more training opportunities (n=154). "I'd like them to be more often and more in depth ... I'd like some monthly or quarterly offerings, maybe even just special topics meetings." An academic librarian suggested that the "state library function as a clearinghouse for cutting edge information ... and training opportunities."

The most frequently mentioned suggestion for improvement was offering the training in more locations (22%), reflecting the challenge of travel time in such a large state. This was especially important for public and school librarians. "Have more programs available for those librarians in the Eastern section of Montana. I can't be away from my library for long periods of time, but I need the help the programs give us even more than some of the other librarians." "Montana is a big state. It would be great if training/continuing ed didn't have to involve so much travel. More small regional workshops and online opportunities would be welcome."

Across the type of libraries, there also was some interest in more advanced or specialized training (5%, n=154). "Offering follow-up training after participants have had the opportunity to try using the product themselves to answer additional questions they might have." One special librarian requested more classes related to that setting, such as medical-related information training from the Pacific Northwest Region of the National Networks of Libraries of Medicine. Public librarians also emphasized the

need for more online learning opportunities (15%, n=73). "Is there some reason we can't do online trainings or some videoconferencing?" "Have more e-training available and have online classes that would count toward a degree."

School librarians expressed a desire for more training specifically designed for their needs (25%, n=52). The school librarians explained these concerns.

- I believe elementary libraries are being somewhat overlooked. I realize community libraries have huge impacts and responsibilities, yet those differ from school library impacts and responsibilities. To a great degree, it is school librarians who are helping build future active community library patrons.
- It seems like the training I have seen advertised is more geared for public libraries.
- I have not found workshops that work for the public school, K - 12, offered. School settings do need continued training just as other settings do.
- I would like more services and support offered specifically to smaller school libraries that don't offer ILL services but still want to do their best for the student patrons they serve.
- If some trainings were geared specifically toward school libraries they would be beneficial. I consider most of the trainings to be geared toward public libraries and their needs, so I don't plan to participate in them.
- Pay more attention to school libraries and help school libraries see the importance of training/continuing education efforts sponsored by the MSL.

Some academic librarians also expressed a need for customized training. "We are an academic library, and the MSL's training is gauged at public libraries." "I have not attended a MSL training because they seem to be heavily oriented toward public library issues and interests." There is a benefit to participating in MSL training by academic librarians. As one person concluded, "Although we are an academic library, we have a mission to serve all citizens in Montana. Because of MSL training and resources, I can better refer my patrons to appropriate public libraries."

School librarians also encouraged more promotion among the schools of the MSL training opportunities (21%). "You need better advertising as to when and where workshops will be held in advance of the event/training. I often get the information late, and a lot of times sections are already filled up." "The state library tries very hard to reach all the libraries in the state, but many librarians are still completely unaware of the services provided by the state library." "I will confess, I know next to nothing about what you guys offer." "I was not aware of the MSL provided training. I would so enjoy attending a training so I could better facilitate my patrons as well as keep my library current." A few school librarians noted the difficulty getting time off and travel funds from the school district to attend training (8%).

The MSL does not have jurisdiction over school libraries or librarians. They are under the auspices by the Montana Office of Public Instruction. This situation makes it difficult to effectively reach the school librarians, and no mandates are in place that requires their participation in MSL training. Much of what the state library offers is open to school librarians, but designing specific training for this population is outside the primary mission of the Montana State Library. MSL does sponsor programs for the annual Montana Education Association conference.

## IMPACT OF MSL TRAINING

Librarians were asked on the online questionnaire which training had the greatest impact on users. Some indicated that several had influenced library services, so they could not choose one (8%, n=194). "I can't just pick out one. Each of the sessions seemed to be exactly right for the time that the library needed something to meet patron needs. If we did not have the MSL leadership, we would be at least 20 years behind the eight ball." "Most of the time, each training I attend gets me fired up about my job. We all need that occasionally." "The impact has been cumulative." "Summer institute has always had the largest effect on my job as director, but it is very difficult to choose one training that has been the best since every aspect of my job is affected by trainings I attend." "I can't pinpoint a certain one because I have received a wealth of information from every one of them."

Given the wide range of topics covered by the MSL training program, 22 topics and events were identified by respondents. People described adding and revising policies, writing successful grants, improved readers advisory services, enhanced services for teens, and changes to the interior of library buildings. Among the 22 topics and events identified, training on the use of electronic resources and databases (especially InfoTrac) was the most frequently mentioned (23%). "The database training sessions usually have immediate impact." "I can take the training and put it right to work in my library for my patrons." "I've become a much better researcher and instructor with our InfoTrac databases." "The last set of InfoTrac training ... was very helpful. InfoTrac is one of the most valuable resources that the State Legislature helps provide for us." This type of training was most likely to be mentioned by school librarians (43%, n=58). Overall, technology-related training was seen as having a positive impact. In addition to the database training, several mentioned general computer and technology training (13%).

Respondents highlighted the cataloging training as having a positive impact on services (13%). This was strongest among school librarians (19%, n=58), and smaller libraries appreciated the opportunity for training in this area. The two remaining topics named by at least five percent of the respondents were the Montana Shared Catalog (10%) and interlibrary loan (8%). "Many small libraries could not participate in things like ILL and the shared catalog without this training."

Several mentioned the summer institutes (8%) and fall workshops (7%) as having the greatest impact. These contained workshops related to the most popular topics. The summer institute and fall workshop were most likely to be indicated by public librarians. "The summer institute ... had a direct relationship to the services our patrons received." "The summer institute week-long session on developing a long-range plan was invaluable ... The training gave me the tools to evaluate our services and resources with an eye that is more attuned to the community." "The fall workshop usually includes training that can be taken back to one's own library and applied." "The fall workshops are such a huge benefit to all of us, and attendance is obtainable to all. We are lucky to have the diversity of training that is offered through these workshops." "I love the fall workshops! For some reason, the topics of the workshops always seem to be timed perfectly for a problem that I am

dealing with. They are in depth enough that I am able to get more than a brief overview." "The fall workshop provided me with information about the library and services available to the patrons that I would not have known."

## OUTCOMES

The questionnaire used a series of questions to elicit feedback on the impact of the MSL training. A total of 231 respondents provided examples of impact. Sixteen outcomes were identified from these responses. While not mentioned more than ten times by respondents, several of the outcomes identified reflect the learning described in other parts of this evaluation. These include improved collection development, effective weeding practices, more appropriate referral, improved reference skills, book mending, new and enhanced policies, and responsive library programs. In addition to these benefits, several major outcome areas were identified by the library community.

- ✓ Improved service for customers
- ✓ Enhanced technology
- ✓ Increased access to online information
- ✓ Increased use of interlibrary loan
- ✓ Effective use of the Montana Shared Catalog
- ✓ Quality cataloging
- ✓ Networking/sharing within the library community
- ✓ More confident library staff
- ✓ Increased effectiveness of trustees

## IMPROVED SERVICES FOR CUSTOMERS

The most frequent response to the question about the impact of continuing education was a positive statement about the value of the training on library services. As staff increased their skills and knowledge, library users benefit with improved services. "Patrons benefit from the new skills and knowledge that the library staff have gained from the training sessions." Two out of five librarians made these type of positive statements (43%, n=231). "The increased technological, professional knowledge helps me to help others more effectively and efficiently." "MSL has enhanced cooperative efforts with improved services." "An informed library media

specialist is an asset to any library." Training provides "ideas that ultimately shape the policies and services that affect the user experience." A selection of responses further illustrates the outcome of improved service.

- Attending has been a pleasure - picking up new ideas, skills, and being able to return home enriched and eager to share what I have learned.
- My patrons have benefited by having a better collection to choose from, having interesting programs to attend, and a larger number of libraries from which to borrow books.
- The training offered by the state allows me to keep up to date on current issues, and by having this training it rejuvenates me. I get excited by what I'm learning, and it is reflected in my work with our patrons.
- I get exposed to new ideas and ways of doing things. I can then implement these things to help my patrons.
- I have a better awareness of how to manage outstanding services [and] better knowledge of issues regarding librarianship.
- I would say that the service has increased greatly. A lot of unique, helpful, and never thought of before ideas proved to be very important. It is important to have the library keep up with changes that occur.
- Training provided keeps us abreast of changes which we in turn share with patrons. The training prompts ideas which we are able to expand on and implement in the library.
- We are a rural library without the benefit of anyone having a degree in library science. Services improve with everything I learn.
- We have been trained and refreshed in areas we may not deal with on a regular basis, but they are things we need to know so when that one patron walks in we have the necessary skills and knowledge to serve them.
- MSL training is very important in keeping librarians informed, especially in such a widespread area such as Montana. Even though libraries may not implement ideas they are exposed to right away, the MSL provides opportunities that help keep librarians informed and looking to the future.

## ENHANCED TECHNOLOGY

Improved knowledge and skills related to technology was linked to improved services by 17 percent of the librarians (n=231). This helps to assure that the local library incorporates appropriate technology to meet user needs and builds the expertise of the library staff to better serve patrons with technology questions and instructional needs. "I gained great background knowledge of technological advances relevant to libraries that will shape our libraries in years to come." "I am more knowledgeable about technology trends in library land. It will help in future directions and planning." "The state library provides the leadership needed to keep abreast of the many changes and newest information on library technology." One librarian described the outcome in this way:

*I feel it has greatly improved because of the knowledge I've gained and bring back to my library, especially in technology. Everyone comes to the library knowing I can help them with their computer problems, issues, and research needs. The automation system and training was a huge step, and we are reaping the rewards.*

## INCREASED ACCESS TO ONLINE INFORMATION

Library staff most frequently mentioned improved searching capabilities as a result of MSL training (20%, n=231). As skills of library staff increase, patrons are more likely to access needed information in an effective and efficient manner. Library staff also are better able to promote use of electronic information sources if they are comfortable using those sources. Among school librarians, the improved ability to search databases and use electronic resources was the most frequently mentioned service improvement (29%, n=75). The comments listed below show the impact of training on use of electronic resources.

- The InfoTrac training we had last fall provided me with several very useful features, of which I was unaware, to use with the students and staff in my district.
- The continual training on the databases always helps to keep our skills fresh and keep the databases in the front of our minds so we make sure we tell patrons about them.

- Montana has always seemed ready to embrace new forms of information such as the Internet or online periodicals. Both have had training sessions which have helped me provide these services.
- I have given instruction to teachers either inservice workshops or individually on the use of InfoTrac, and I have instructed classes of students on its usage.
- It helped in knowing how to introduce students and teachers to the various online databases.
- I am able to locate particular resources much more quickly, and I am able to ascertain exactly what they are searching for much more quickly, too.
- Training guides and encourages libraries to train library users to use the magazine and auto repair databases.
- I have learned more about search techniques which I can then pass on to my students.
- Probably the largest benefit to my patrons is the ability the training gave me to share technological resources with them and enable them to open up the whole world for themselves.

#### INCREASED USE OF INTERLIBRARY LOAN

Improved resource sharing via ILL and efficient ILL processes were identified by a number of librarians as an important outcome from the training (14%, n=231). Increased use of ILL is tied to well-trained staff. "The biggest benefit I can now offer at my school library is interlibrary loan." "Training keeps the library staff updated on interlibrary loan changes."

#### EFFECTIVE USE OF THE MONTANA SHARED CATALOG

Training related to the use of the Montana Shared Catalog was mentioned as a key benefit for users (9%, n=231). Since participation in MSC is chiefly from public and school libraries, they are the most likely to link MSC training to better service for users. Examples of the impact of the MSC training are described below.

- The MSC training sessions allow me to take better advantage of the things offered through MSC. The training costs no more than time

away from work and transportation to the training. That is a great price.

- Since we are members of the Montana Shared Catalog and its catalog is our catalog, my training in how to better use it is essential for helping our patrons find the materials they are looking for quickly and efficiently.
- I cannot help my patrons take advantage of new services offered through things like the Montana Shared Catalog and online resources unless I know about and understand how to use them myself. So the training is essential.
- Our patrons are thrilled to be able to see our collection and interact with it through their home computers. Our circulation continues to climb despite our no-growth population. Other training has been excellent, but the MSC is the crown jewel in my view.
- Patrons and staff are both able to use the shared catalog to locate material in our collection with speed and accuracy.
- It improved the way in which material is made available to our patrons, i.e., became more aware of resource sharing opportunities.
- We are members of the shared catalog ... We could not participate ... without training and support. These programs have enabled and empowered our community by providing cost effective and efficient access to over 500,000 items.
- Training in various aspects of MSC ... has directly impacted how we serve our patrons, particularly in how we search for and provide information to them.

## QUALITY CATALOGING

About one in ten people reported that cataloging instruction benefited customers because quality catalog records made searching more efficient and effective (12%, n=231). This outcome was the strongest with special/institution librarians (24%, n=21), academic libraries (22%, n=27), and school librarians (16%, n=75). A sample of comments listed below illustrate this outcome.

- Service to our patrons has improved because people on our staff have received training on how to catalog ... and they have shared this knowledge with the rest of the staff.

- I do all my cataloging through OCLC CatExpress. I think our records are high quality and more complete.
- Better cataloging skills help patrons locate books more quickly.
- I am able to use the cataloging materials to put books out on the shelves faster.
- Search capabilities in our catalog have improved due to improved cataloging training.
- This [OCLC] saves me countless hours. Before, being a small school library, I had to meticulously document ISBN, title, etc. and wait until I had a decent list which I sent to Sagebrush. They would return the records as quickly as they could, but it wasn't an efficient system at all.

## NETWORKING/SHARING WITHIN THE LIBRARY COMMUNITY

Learning from each other and using the resulting network is an outcome of the training events (8%, n=231). This was an outcome for staff at all types of libraries. The comments from respondents show the usefulness and power of people networking and sharing ideas. It extends the learning from training when ideas and information are shared with others.

- I've shared my knowledge with others in my agency from the MSL training.
- Training gives library directors, trustees, and staff an opportunity to network with peers and sharing ... program ideas.
- It is always helpful to see what other libraries are doing to plan for the future and to improve on current practices.
- Training helps me not feel alone, giving me somewhere and someone to help me be a better librarian and teacher.
- When librarians meet for training ... we also talk about questions we might have in our library beyond what the actual training provided for us. We bring back new ideas and new programs.
- I have had the benefit of training as translated through coworkers. They have had the training and pass along the information to me. I have found the information useful, even though I haven't participated immediately in the trainings.
- We have found ... the contacts made through the training sessions assist us in providing service to our patrons.

- Connecting with other librarians invigorates as ideas that work are shared.
- Because we live in a state where face-to-face communication and assistance with training is hard to come by, the workshops provided by the state library affords librarians throughout the state an affordable way to gain hands on training and camaraderie. By participating in the training and having the opportunity to discuss current issues in librarianship, I can better serve my clients.
- Being up to date on what is happening around the state helps my patron service as I am aware what other libraries are doing.  
Networking with other librarians is important.
- We continue to expand and improve service to the public by the information and enthusiasm we get from colleagues and workshops.
- I believe that the biggest benefit to me has been coming back from trainings with a renewed sense of a Montana library community. I always start back at my library with an enthusiasm for what we offer as a team of dedicated Montana librarians.
- We gain so much from the training. An integral part is the sharing of ideas from other librarians who attend the training.

#### MORE CONFIDENT LIBRARY STAFF

Library staff reported being more confident of their own abilities as a result of training. A more confident librarian is better able to serve customers. Many of the comments that reflect this outcome are linked to comments about the other outcomes described in this section. A few sample comments, however, illustrate the importance of this outcome on user services.

- It [the training] was extremely helpful in improving confidence in what I offer to the public and where I can send them for further info.
- I was able to provide inservice to my teachers because of training I had. I felt comfortable enough to get up in front of my peers and do it, and the networking I did with other librarians was invaluable.
- I am more confident now that I am part of something larger than my own library. It is a great thing to be able to ask questions, to know contact persons by name. It is helpful not to have to be the innovator

of new procedures, to be instructed and assisted in a personal way. I feel supported academically and socially by being a part of the MSL trainees.

□ It has broadened my knowledge and outlook in areas that I may have held back on learning about because I feel unsure of myself. I appreciate the great variety of training offered. It has empowered me to try new things even when I may not be encouraged to do so locally.

## INCREASED EFFECTIVENESS OF TRUSTEES

Public library staff identified benefits of training for the board of trustees. The most frequently mentioned outcome was improved understanding of the role and responsibilities of a trustee (37%, n=41). This outcome includes a clearer distinction between the library director's job and trustee responsibilities. Public library directors described the value of trustee training.

- The trustee training has helped those that govern the library to be aware of the magnitude of their responsibility to provide services that patrons want and need. It has helped them do a better job and be able to look at our library in the midst of the global implications that face our patrons.
- We had trustee training when I first started as library director, and it helped the board better understand their role vs. my role. It was invaluable.
- The state library has sponsored trustee training that ... has made my job easier because they now have a better understanding of what they need to do to make the library a well oiled machine. It also keeps the board up to date on ... what the public is interested in so they are looking at the improvements that are required to provide quality library service. When the trustees are aware of library issues, they are willing to make changes necessary to meet the expectations of the users.
- Developing trustees, who are volunteers with other jobs, to the point where they can fully embrace all their responsibilities is a slow process, but I think the trustee training provided by MSL does aid progress toward this goal.

- My board members LOVE the trustee trainings that they have attended. They have all come away from the sessions with lots of ideas that they share with the members that could not attend.

The trustees who attend training are exposed to library issues and better informed on fundraising (10% each). "Our board chair is putting in more time and giving more attention to library issues as a result of trustee training." "The trustees who attend certainly benefit from guidance and instruction. Learning how to fundraise means more money for the library and that ultimately results in better services to patrons." "This training has given my library board the information they need to understand budgeting, do long-range planning, understand public meetings rules, and policy development." "Our trustees have become more aware of their need to become active, and they are ... now an active group, who constantly look for ways to improve our service."

While for some libraries there is clearly a positive outcome from trustee training, the real issue for Montana is reaching all - or at least the majority - of the public library trustees. In the online survey, only 41 librarians identified a specific, positive outcome for trustee training. Given that the MSL trustee training reaches a small number of trustees each year, this is not surprising. The online questionnaire responses also show the difficulty of getting trustees to attend training. Twenty librarians commented on this problem. "Library trustees are often the busiest people in a small community. They may serve on ... many other boards plus hold down full-time jobs, have small children, or they are older and cannot travel and attend board training." "Our board hasn't felt it was feasible to travel the long distances required to attend the training available. If more training could be made available locally, that would be great."

## **Conclusion**

This in-depth evaluation of the Montana State Library training effort shows a clear plan for offering effective training for public librarians and trustees. It also makes training available to other types of libraries, especially in the area of technology, including electronic databases and the statewide shared catalog.

The training events consistently receive high marks for quality of instruction and helpfulness of the content. Participants are able to articulate what has been learned and how the new knowledge and skills will be used. Even more importantly, the Montana library community understands and can describe the outcomes of the training on users, the library, and library staff.

## MONTANA STATE LIBRARY LSTA EVALUATION SECTION IV

The Montana State Library regularly uses outcomes-based evaluation (OBE) in its continuing education program (described in Section III). The Montana Talking Book Library (MTBL) also gathers feedback from its users that demonstrates the impact of the service. This section focuses on the MTBL program and highlights the outcomes as described by users and their families.

The Montana Talking Book Library serves qualified Montana residents who - because of a disability - cannot use standard print resources. The service ensures that this population has free and easy access to reading materials. The free service is provided to those Montana citizens who are blind, low vision, or have physical or reading disabilities.

The services offered by the Talking Book Library include materials in three formats - cassette, Braille, and digital. The TBL services include:

- ✓ Audio books
- ✓ Newsline (newspaper over the telephone)
- ✓ Braille books
- ✓ Digital books (online downloads)
- ✓ WebOPAC
- ✓ Newsletter (audio)
- ✓ Descriptive videos
- ✓ Magazines (audio)
- ✓ Borrowing audio books from other states (interlibrary loan)

In addition to services to individuals, the MTBL advises and assists other libraries, nursing homes, schools, and institutions as they provide library services to eligible individuals. The Montana State Library also refers patrons to the Radio Reading Service.

Currently, 2,656 eligible Montana citizens actively use this free service. The service is used by people of all ages. Of these, 1,967 are 50 or older.

There are 1,254 visually impaired users and 844 blind patrons. Those with physical and reading disabilities make up the rest (226 and 332).

For FY 2006, a total of 122,505 audio books circulated and 1,649 Braille titles were loaned. Use of magazines totaled 10,415, and descriptive videos were used 516 times. They have 21 WebBraille users who downloaded 2,032 books. Customers made a total of 2,883 WebOPAC searches.

Regular communication with users is a hallmark of the Talking Book program. Statistics from the first eight months of FY 2006 show that staff responded to 5,068 calls from customers and initiated an additional 3,922 calls. Email was used with patrons a total of 893 times.

The program is affiliated with and accredited by the National Library Service (NLS). In addition to recordings done by NLS, the Talking Book Library regularly records Montana-related books and magazines. In FY 2006, 41 Montana books and magazines were recorded. Some of the books are recorded by prisoners at the Montana State Prison. One prison volunteer wrote, "Please accept our gratitude for renewing our faith in humanity. You send us some of the best Montana books to record for the blind and low vision. Your service helps us give back to society in a way we never expected would ever be possible."

The value of the service is demonstrated in part by the incredible number of volunteer hours given each year to shelve, rewind, and retrieve and mail materials to customers. Across the last four years, these hours translate into over five-full time employees each year. In FY 2006, a total of 12,698 volunteer hours were contributed. This represents 6.1 FTE. Clearly, without this kind of response from Montana citizens, the MTBL could not operate the services.

## KNOWLEDGE OF MTBL SERVICES

One of the goals of the Talking Book Library is to reach out to potential users of the service. Staff at Montana libraries are a key referral source for the program. A 2007 online questionnaire completed by library staff in Montana asked about knowledge of the MTBL. Across all types of libraries, two out of five felt they were *somewhat knowledgeable* about the services of the MTBL (42 percent, n=392). Another 30 percent reported *good*

*understanding* of the services. Only four percent felt they had *in-depth knowledge* of the MTBL. One quarter of the respondents had *no knowledge* of the MTBL services.

There are clear differences in the responses based on type of library. The public library community were the most likely to have a *good understanding* of the services, with 46 percent identifying themselves in this category (n=143). Another 31 percent of the public library staff reported being *somewhat knowledgeable* of MTBL. Academic and school libraries were the most likely to report *no knowledge* of the services (30%, n=57, and 29%, n=156). One quarter of the academic libraries reported *good understanding* of the service, and 30 percent of the special/institution libraries reported a *good understanding* (n=37). Only 16 percent of the school librarians felt they had a *good understanding* of the MTBL services.

#### REFERRALS TO MTBL

When asked about referrals to the Talking Book Library, two out of five respondents indicated that they did make referrals (39%, n=392). Another 16 percent were not sure if the library was making referrals. Significant differences emerged when the answers are analyzed by type of library. A key source of referrals to MTBL is the public library; two-thirds reported making referrals to the service (67%, n=143). For special/institution libraries, 38 percent did referrals (n=37). The fewest referrals come from academic and school libraries, with one out of five libraries in each case referring users to MTBL (21% for each, n=57 and n=155).

A set of telephone interviews with Talking Book Library patrons and an online questionnaire for WebOPAC users were conducted in early 2007. Users were asked how they had heard about the service. The most common referral source among those who participated in the telephone interviews was a friend or relative (35%, n=58), with one quarter having been referred by a blind/low vision agency (26%). Among the WebOPAC users, the primary sources for MTBL information were blind/low vision agencies (31%, n=26), with over one-quarter hearing about the service from a friend or relative (27%). Other sources of referral were physicians (15%, n=84), eye care professionals (8%), and public libraries (7%).

## USER PERSPECTIVES

A critical measure of impact of the Montana Talking Book Library is the number of people TBL users have told about the service. Fred Reichheld in *The Ultimate Question* argues that customer satisfaction is best measured by one simple question: "Would you recommend this to a friend?" The telephone interviews and online questionnaire asked respondents about the number of people they had talked to about MTBL. The results are astonishing. Nine out of ten people had told at least one person about the service (90%, n=83). Nearly one-quarter reported telling ten to twenty people about the service, and 12 percent told over 30 people. Using a conservative estimate, this group of 83 users recommended the service to over 1,250 people. As one person remarked, "I would recommend it to everyone." This reveals extremely high levels of satisfaction with the Talking Book Library.

This effort to spread the word about the service is linked to a desire for more promotion by MTBL. When asked in the interviews and questionnaire about changes needed in TBL, seven people mentioned the need to increase awareness of the service.

- They should advertise and get the word out more. Several people I have talked to didn't know anything about it.
- Let people know who have a reading disability that the service is available.
- I think doctors' offices should take the time to tell elderly people about this service, because we never heard a thing at my Mom's doctors.
- The audio books are just wonderful. I wish more people knew about them so they could use them.
- There is a real need to promote things available to the blind.
- Get the word out to people that this service is available.
- I wish more people knew about this service. Contact more people in nursing homes to tell them. I visit the nursing home, and a lot of people don't know about it.

The Talking Book Library is continuously promoting the service among potential referral agencies and users. As indicated by the high percentage

of public libraries aware of the service, the message about the services is visible among that group. Agencies that work with the target population also are the focus of promotional activities by the Talking Book Library. An ongoing concern at MTBL is reaching people early, either as a child or in the early stages of losing vision.

There are alternative ways to access audio books, and people reported using the public library, purchasing books, downloading digital audio books, and receiving gifts. Half of the respondents have used audio books from sources other than the MTBL (n=84). The most frequent alternative source is the public library, with 57 percent using this source. Purchasing was reported by 29 percent, with several reporting gifts from friends and family. Only two people reported downloading digital audio books.

When asked to compare these sources to the MTBL, 42 percent indicated they were just as good and 55 percent said they were worse (n=33). The primary difference between MTBL and the other sources identified by respondents was a much better selection of titles with the Talking Book Library. From the telephone interviews, it is clear that these other sources are supplemental to use of MTBL rather than primary sources for needed materials. As one woman said, "My kids used to purchase audio books for me. I told them to stop since I use the Talking Book Library."

The Montana Talking Book Library periodically gathers feedback from its users to assess the quality of the services and its impact on users. The responses on mailed surveys over the last decade reveal a pattern of high satisfaction and appreciation of the service with minimal complaints. Further, users see only positive effects on their lives from using the resources of the MTBL.

Telephone interviews and an online questionnaire validate these earlier findings. When asked to rate the customer service of the MTBL, the results are overwhelmingly positive. No one gave a rating of *poor*, and all but one person was *satisfied* with the service. Three out of five users rated the customer service as *outstanding* (61%, n=76), with another one quarter giving a rating of *very good* (26%).

Those using the WebOPAC also were asked about the quality of that product and staff assistance with it. More than one quarter of the WebOPAC users with valid email addresses responded to the questionnaire (29%, n=90). Most of the WebOPAC respondents used the online catalog for three purposes: searching (80%, n=25), reading descriptions of books (72%), and placing orders (84%).

Overall, users of the WebOPAC gave it a very positive rating of 4.2 (five-point scale). The ease of access to the site was rated 4.0, and ease of searching on the WebOPAC rated the same (4.0). Not surprisingly, the helpfulness of staff assistance with the WebOPAC received the highest ratings (4.6).

The respondents to the survey and telephone interviews were very clear about their appreciation for the staff and services of the Talking Book Library. Positive comments about the staff and service came from most of the users. "Great service. We are totally satisfied with the Talking Book Library. We can't say enough good things." This comment from one user seems to represent the feelings of the group.

*The services cannot be over-emphasized in terms of their value, both to me and to nearly every other blind person I know. The only thing I can say is that I only wish that more places had customer service which is as good. They listen, they help, they care. That has come through every time with the Montana Talking Book Library.*

When asked, "What else would you like to tell us about using the Talking Book Library?" 65 percent made general positive statements, while 35 percent specifically mentioned the staff (n=68). One out of four highlighted the speed/promptness of the service (26%).

A sampling of the many positive comments shows the enthusiasm of users for the service. A diverse collection, dedicated staff, and prompt service combine to create a positive experience for users. As one person summed it up, "The service has always been a very good experience."

- I've always received wonderful service. It has been a wonderful resource, more appreciated than you can imagine. Keep up the good work. It's been very effective.
- I honestly can't think of any way to improve this service. I'd like to thank all of you for providing this wonderful service.
- The people are wonderful, the service is excellent, and the books are bountiful! My mom and her entire family thanks you all. I tell people about the gift my Mom feels she has received by being able to round her day out with reading so that other people can discover it as well.
- I am very fortunate to be a patron of this library. I would be lost without my talking books. The staff is so professional and willing to please. Thank you for this important service you have given me and others who cannot read or see. Overall, an excellent service. A blessing to America!

Staff are consistently cited for their friendliness and quality of service. Without a doubt, the personal service users receive result in not only positive comments, but a real appreciation for the staff of the Montana Talking Book Library.

- They want to please me.
- I can't sing enough praises. The people who work at the Talking Book Library all deserve raises. The people I talk to are helpful. They try to find any book request.
- It seems the people who do this are really dedicated, and I really appreciate it.
- They are very helpful and get anything I want. They are fabulous.
- Staff go out of their way to help me. The people are superb.
- Everyone there is willing to help me.
- My readers advisor is the best -- very helpful, friendly, and a pleasure to work with.
- They have been very helpful in all of my dealings with them. I'm so glad that we have it.
- I am so happy this service is available. Everyone I have talked to there has always been polite and makes sure all my needs are met.

Going beyond the ordinary was a theme in these comments about the staff. "I can ask them for anything, and they get it for me. You can't beat it with a stick. It has been a lifesaver for me." "Very nice people. They go the extra mile. They get anything special I need." "They have really helped me. If they can't get it locally, I get them interlibrary." "They really go out of their way. It's a fantastic program." "Anytime I call or want anything, they do their best to get it to me. I really like the people, and they do a great job."

The promptness of the service delights users. Their comments show how satisfaction is a factor of both quality and efficiency.

- Everybody is always friendly and prompt. They are just wonderful.
- I mail a book to them and within two days, I have a new book. I have a question, and they answer it right away.
- I call and they send me a book right away. Good outfit.
- They are always nice and get back to you quickly.
- It's just super. They send you information immediately.
- I get great service. I'm amazed at how fast I get books.
- I finished a book, but didn't know it was a series. It ended in a cliff hanger. I immediately called the service, and I had it the next day! I am so happy with the service.
- Fast service. Much, much better than the service I had in another state. You had to send a tape back to them before getting a replacement tape if the one you had broke. I call the Montana Talking Book program to say the tape doesn't work, and they have a new one sent to me in two days. Excellent service.

Two people specifically mentioned the continued need to support the MTBL. "We hope the government keeps funding this worthwhile project." "I hope the legislature continues to support this project." A third noted that this is "the best government service there is."

In addition to the systematic data collection from users, the Talking Book Library regularly receives letters from its patrons and family members thanking them for the service. Comments from a few of these letters illustrate the importance of the service.

- I have enjoyed your books for 36 years now and am amazed that you continue to offer the great services that you do! I hope you never get tired of me calling and pestering you for different books my friends tell me about in our book club.
- Thank you for your super service keeping me entertained with your wonderful books. Because of your talking books, I am able to read every day. I am most grateful to all of you.
- My father and my uncle both lost their vision due to macular degeneration. I have vivid memories of my Dad with his earphones on listening to books. They both spent many hours listening to novels and especially their favorites - westerns.
- I appreciate your services very much to us old, half-blind dodgers. There is a statue of my grandfather in Cascade (MT). He was the first president of the Braille Institute in Los Angeles.

## SERVICE IMPROVEMENTS

Respondents to the online survey and telephone interviews reported very few problems with using the service. Equipment problems were reported by 15 percent of the users, but the prevailing opinion was that the problems were resolved quickly. Seven percent reported receiving damaged audio books. The most common response to this question was that no problems have occurred while using the service (68%, n=82).

When asked about what they would change about the Talking Book Library, the most frequent response was "nothing." Half of the users had no suggestions for improvement (n=84). The majority of the suggestions for improvement related to the collection (40 percent, n=42), but no pattern on areas of the collection was identified. The only author mentioned more than once was Louis L'Amour, and some just wanted "more" - in general and in specific subject areas. As noted earlier, some comments were made on the need to promote the service (17%). Four people indicated an interest in digital downloaded audio books. Comments on potential improvements to the WebOPAC were infrequent and revealed no pattern.

## IMPACT OF THE MTBL SERVICE

The responses to the telephone interviews and online surveys show how vital the Talking Book Library is in the lives of its users and their families. Not only are the users direct beneficiaries of the service, but family members appreciate how much the service had improved the quality of life for their loved ones. Users comment that "I can't survive without it," "it keeps me going," and "it gives me a lot of comfort."

Analysis of the examples people gave of benefits of the service indicates that the service is a primary source of enjoyment and entertainment. Repeatedly, respondents described how much enjoyment they derived from the audio books. "Ninety percent is for enjoyment." Over half of the users reported how enjoyable it was to listen to the books and how audio books were a primary source of entertainment (55%, n=80). "Having access to the Talking Books has been and remains an immense and immeasurable value. It has enhanced my enjoyment of reading and widened my horizons in terms of interests."

Over a third specifically noted how the service made a difference in their daily lives - "a lifesaver" (38%). "The audio books make my life worth living." Some explained how the audio books help them avoid boredom and "just help get me thinking" (14%). It "helps pass the time," and "it fills the time." It "has helped with boredom associated with not being able to do other activities." "It is my only source of anything to do." "It had filled hours of time, and I can't imagine being without it at this point." The beneficial outcomes of this service are clear.

- It gives me company to listen to the tapes. It takes the doldrums away. When I listen to the story, I feel like I'm there. It's great.
- It has given me a lot of enjoyment. I used it when I was in school (recorded textbooks). It was a big help. It got me through a time when I thought I had nothing for somewhat of a normal life.
- I use it every day. It has given me something to live for.
- I'm in a world of freedom that I never knew about before.
- My husband had a stroke. I don't know what we would do without the system. It keeps him stable and updated on current events.
- I don't have anything else I can do but listen to the books.

- It helps me get by and makes the day go faster.
- I could not live without them. It keeps the days busy.
- If I can't sleep at night, I use it. I listen to it while I am doing housework.
- The Talking Book Library has opened up a whole new world for me because it gives me access to forms of media -- books, magazines, DVDs -- that I would not otherwise have available to me.
- After spending eight years working my way through university, I paid a lot of money to have someone "fix" me. You see, I had only read two books in my life. They told me about books on tape. I was like a kid who had never seen TV, but times ten. I fell in love with books on tape. It opened up a whole world to me.
- If it weren't for the audio books I listen to everyday, I would not have books in my life as my spinal problems make it difficult to read printed materials.
- I can do something besides sleep. I do not see and cannot get around, so the books fill up some very boring hours.
- Receiving the Talking Books has been an invaluable help for me. I have macular degeneration so it's difficult for me to actually read for any length of time. With Talking Books I can continue to enjoy all the pleasure of the written word.
- This service has totally changed my Mom's life. She was a career person and when she lost her vision at 78 she tried to stay focused on taking care of herself and staying busy, but it became very difficult. This service totally meets her needs.
- My mother loved to read and found herself unable to sleep at night without a book to look forward to. She listens to the books now when she hurts or when she is wakeful and appreciates this service so much. It has made such a difference. At 91 years old, there are so many losses, and now she has books back so that's a gain!
- The library has brought me many hours of pleasure and information. Due to injury, I can no longer "read books," and I have always been an avid reader. I can no longer work outside the house or leave my house often. TV is very hard to watch. So I am thrilled when I see the green boxes come in the mailbox. I have enjoyed dozens and dozens of your books.
- I cannot read for any length of time due to a brain surgeries which have left me with migraines and seizures. So it is wonderful to be able

to relax and listen to books. Reading has always been a passion of mine, and this service has made my life so much more enjoyable.

Several reported how they had been active readers before they lost their sight (14%), so talking books allowed them to continue to be avid readers. "I use it for hours and get a lot of books on history." "I was an avid reader. When I couldn't read anymore, I was lost." "I was an avid reader all my life. It saved my life." "[Audio books] enabled me to listen to stories I used to be able to read." "It has allowed me to continue with my passion for reading." "I am an avid reader and love going through the online catalog just to see what books are or will be available." "After losing my sight, it allowed me to remain an avid reader." "As an avid reader all my life, not being able to enjoy books would be devastating."

A few noted that they have been exposed to more authors and titles by using MTBL (8%). "I have found many new wonderful authors and tell others when I find a book they would like, too." "I discovered I enjoyed westerns." "I've also been exposed to many books and authors. I'm better read now than before I lost my eyesight." Using TBL can give a person "a chance to hear books that I normally would not have been exposed to." "It has enabled me to read more widely than I otherwise might." Five people reported actually reading more books as a result of the service. "I now have the time to listen to books I didn't have time to read before." "I read a book a day."

Ten percent use the collection to keep up with current events and issues. Learning new things and getting answers to questions are other outcomes of using the service.

- I learn things for some of my classes. I enjoy getting books related to my masters degree in psychology. I'm just getting started for my degree, and I get as many books as I want.
- The information I get is great. I really like history.
- It has allowed me to continue with my passion for reading as well as providing me a source for getting information.
- I got a book in Braille about breast cancer after I was diagnosed, and it was really helpful. I don't know what I would have done without them.

- It keeps me aware of what's going on and aware of medical information. I was kept informed of diabetic things when I found out my son was diabetic.
- I am a scientist and the nonfiction keeps me updated with what's going on.
- My son is dyslexic and uses your service for homework.
- I feel like I can keep current on new topics through the many magazines and books that are offered.

Sometimes use of the service is a family affair. Some reported listening to the book with their spouses. "It opened up a world to me. My husband (not blind) and I spend time listening to the books." "I also get books for my children to listen to because I can't read to them." "I have six children and 16 grandchildren. Periodically they come over and we all listen to the books together."

Letters from users also help illustrate the impact of MTBL on users. They see the materials they use as an essential part of their lives. Many letters come from family members. These comments help tell the story of the significant outcomes of the talking book service.

- I was waiting for my gas bill, but your organization will get a donation regardless. I need the heat to stay warm this winter, but without my books on tape my mind would have gone to mush!
- Your service has increased my quality of life, and I really appreciate that and you.
- We wish to express our thanks for the many hours of enjoyment that our father got as a result of this program. He loved to read, and when he no longer could, these tapes filled that void for him.
- My mother died at the age of 97. She enjoyed the talking books almost to the end of her life. One year, after listening to *Kontiki* by Thor Heyerdahl, she got paperback copies of the book for the whole family for Christmas! Thanks for being an important part of my mother's life.
- I am deeply indebted to you and your service. A new book was recommended to me recently, and I just knew you wouldn't have it, but you did! It turned my life around. Without your service I don't know where I would be.

- I read more than I ever did. The books are wonderful.
- I thank all of you for the wonderful service you rendered to [my wife] over the last several years of her life. The talking books, of which she read several hundred, were truly a lifesaver and mind saver for her.
- Ever since my wife started getting your books, I have a full-time job keeping them coming. They keep her out of trouble, and we get to talk about and share whole new worlds together!
- Thank you ... for the years and years of pleasure that you gave my husband by sending a steady stream of talking books and magazines. They kept his mind busy ... it gave him lots to think about and discuss with friends and relatives.
- I'm having another surgery soon, and I couldn't get through physical therapy without them. Thank you.
- I hear book titles from my sighted friends, and I've always been able to find them at the Talking Book Library. You have been my salvation. Because of your service, I can continue in my book club and remain involved in my community.
- Thank you for keeping me current with current events from magazines and bestsellers you send me. This helps me have stimulating conversations with sighted readers.
- I really appreciate the books and how kind you are. I would be lost without them. When I get books in the mail, it is just like Christmas or my birthday. My dog and I curl up and listen to books.
- I've been on your service since I was 16 years old. I've been able to get my high school diploma and college degrees because your service existed and your library folks thought my education was important to them as well.
- Your service has really saved my life many times. When I can't stand the pain in my body (rheumatoid arthritis) and mental problems that go with it, I have the option to listen to a book and move out of myself. What a relief!
- My husband gets a lot of enjoyment out of your services. All the tapes you have sent him have been a source of information, inspiration, and enjoyment for him ... We celebrated our 60<sup>th</sup> wedding anniversary, and your services are a big help to us in our golden years.
- My sister-in-law received your services for several years. She was in great pain for many years and listening to Talking Books helped her

get through some difficult times. Thank you so much for the comfort these books provided.

Mom is looking forward to reading again now. Before, she wouldn't accept the blindness and kept thinking all would be better so she sat from day to day getting more depressed. Not any more! She now enjoys sharing adventures from her books with friends, family and neighbors.

## MONTANA STATE LIBRARY LSTA EVALUATION SECTION V

The Montana State Library approach to the LSTA process focuses on projects that have statewide impact. The range of projects described in Section II are linked together by one common thread - improvement of local library service through statewide library initiatives. Programs and services having the biggest impact on local libraries are closely related to those with the greatest statewide impact. As one librarian concluded, "LSTA funds help make libraries one of America's great bargains - public funds effectively spent for the benefit of all."

By using LSTA funds for statewide projects, Montana libraries can offer timely access to information despite its location or format through the statewide information access projects. The consulting services and training help libraries plan for and develop quality local services leading to libraries becoming integral components of their communities. Assisting libraries as they promote services and tell the library story to stakeholders contributes to building local support for libraries. The special needs of the visually impaired are effectively met through statewide delivery of audio and Braille materials.

The consortia-based information technology projects follow the national trend toward shared funding for improved technology services. In the 2007 MSL online survey, several respondents noted that their libraries would not have a quality online catalog without the Montana Shared Catalog and access to online databases would not be affordable to many libraries on an individual basis. The power of group purchasing and contracts had been demonstrated in other states, and the benefits are clearly evident in Montana. The consortia approach also strengthens relationships among librarians, creating partnerships that lay the groundwork for future collaborative efforts.

The Montana library community supports the focus on statewide services and projects. As demonstrated by the responses on the 2007 online survey of librarians, the most important services from the state library were those that had a statewide impact - access to databases, the Montana Shared

Catalog, consulting, and training. When asked for comments about LSTA, the librarians reinforced the value of the statewide approach and its importance for local libraries.

- Belonging to the state system and services has made our library an important and viable resource to our community. We are a link now - not a poor small town library scrambling to help patrons.
- LSTA has been vital for Montana libraries. Without it, we would be a state of haves and have nots. It has provided the basic 21<sup>st</sup> century library services - online catalogs, online periodicals, improved access and sharing - and a host of other benefits that library users have come to view as essential library services. These benefits are available to libraries regardless of size or audience, and the state library has found ways around the cost and technology barriers.
- Progress has been made in managing LSTA funds when competitive grants were no longer offered. LSTA funds are very important to the development of public libraries and should be used to support cooperation. [We] should not be in competition for funds.
- LSTA has become an essential player in providing library services to our patrons. Many small and medium sized libraries and even some larger libraries would not be able to function as well as they do without it. LSTA has helped to level the playing field for the "have not" libraries and communities.
- I believe these funds are used to the benefit of our users by providing access, training, and professional and timely technical assistance. These services would be cost prohibitive for each individual library to assume.
- This is a wonderful program that provides resources and services to people from all areas of the state - from urban (by Montana standards) to rural, from rich to poor, from recreation to education, from preschool through older adults.
- If we lost these services, our users and staff would be at a great disadvantage. It would be very hard to remain current and deliver the kind of efficient/updated service that is now available.
- LSTA funding continues to have a significant impact in improving library service across Montana through staff and trustee training, database licensing, and resource sharing.

- ❑ Without this funding little libraries like ours would not be able to offer our patrons half as much as we do now. I know we would not have been able to join the MSC or been able to afford any of the databases we enjoy now without the help of LSTA funds. We utilize the state technology people all the time. They fill such a big hole for all the libraries that do not have a staff member who is also a technology guru. I know for a fact that if LSTA funding went away, our patrons ... would feel like they went back to the Stone Age.

The Montana State Library has chosen to utilize their LSTA funds to provide the most good for the most libraries. This evaluation did not identify any evidence to counter that approach. The size of the state combined with its low population density affects the decision to use LSTA funds for state-level initiatives. Further, this approach allows for expertise in library development and technology to be available to all libraries in the state instead of a few. This is both an efficient and effective strategy. In order to gain the greatest return on investment, it is logical for Montana to focus on statewide projects.

## MONTANA STATE LIBRARY LSTA EVALUATION SECTION VI

The starting point in the evaluation process was the current Montana LSTA long-range plan. The goals provided the framework for the study.

The evaluation process for this LSTA evaluation used a variety of approaches to help assure a broad range of input into the study. The following strategies were used.

Key informant interviews. Staff at the Montana State Library were interviewed throughout the process. A conference call was used to review progress on the LSTA long-range plan. Data collection instruments were approved by MSL staff before use.

Review of existing information. The state library is a data-rich environment. Besides reviewing the LSTA long-range plan, the evaluation consultant analyzed annual LSTA reports, training outlines, evaluation forms for continuing education events, previous Talking Book Library questionnaires, letters from TBL users and family members, and relevant statistics. The continuing education program conducted regular OBE assessments on selected training activities. These were integral to the evaluation.

Online questionnaire. The entire Montana library community was invited to participate in an online questionnaire that asked for information about the MSL services and products, LSTA goals, and impact of LSTA-funded activities. Library staff from academic, public, school, and special/institution libraries provided in-depth feedback via the questionnaire. This was administered during January and February 2007.

Telephone interviews with Talking Book Library users. The interview guide was designed to gather feedback on the impact of the service and to assess the quality of the service. Using a sample of users of the Talking Book Library, telephone interviews were conducted during January 2007. The goal was to complete 50 interviews; 58 were completed, representing most of the counties in Montana.

Online questionnaire for Talking Book Library users. Users of the TBL WebOPAC were invited to participate in an online questionnaire. This online questionnaire paralleled the telephone interview guide and also asked questions about the WebOPAC. This questionnaire was administered in January and February 2007.

Review of draft report. The MSL staff reviewed each section of the draft report, clarified issues that emerged from the evaluation, and offered editorial suggestions. The Montana State Library governing board, the State Library Commission, provided feedback on the draft report via a conference call in March 2007. This provided additional insight into the effect of LSTA in Montana. Information from the conference call was incorporated in the final report.

The Montana State Library contracted with Debra Wilcox Johnson, Johnson & Johnson Consulting (Waunakee, WI), to conduct the evaluation. Staff coordinated the effort and provided the information needed to complete the evaluation. The total cost of the evaluation is estimated to be \$12,500. This includes a contract with the consultant for \$10,770.